

Hellman & Friedman | PE/Buyout Profile

General Information

Description

Founded in 1984, Hellman & Friedman is a private equity firm headquartered in San Francisco, California. The firm seeks to invest in consumer services, retail, energy, industrials, financial services, technology, information, content, business services, healthcare, insurance, and insurance service sectors across the United States. This firm is a Registered Investment Adviser (RIA). The firm has additional offices in London and New York.

Website	www.hf.com	Total Investments	911 [†]
Entity Types	PE/Buyout Other Consultant Type	Active Portfolio	34
Also Known As	H&F	Investments (TTM)	68 [†]
Legal Name	Hellman & Friedman LLC	Exits	120
Investor Type	PE/Buyout (<i>Primary Type</i>) Growth/Expansion	Med. Round Amount	\$575.00M
Investor Status	Actively Seeking New Investments	Med. Valuation	\$925.00M
Year Founded	1984	# of Professionals	88
AUM	\$107.49B	Trade Association	Private Equity Council (PEC)
Dry Powder	\$24.43B		

[†] Includes add-ons

All investments are equity/add-on investments only

Investment Style Summary

Investment Style Summary



Deal Size

All Years

\$1.47B

Total Deals - 146

Past 5 Years

\$3.22B

Total Deals - 32

Deal Type

All Years - Specialist

Buyout/LBO - 93.80% (847 deals)

PE Growth/Expansion - 2.44% (22 deals)

Secondary Transaction - Private - 1.11% (10 deals)

Total Deals - 903

Past 5 Years - Specialist

Buyout/LBO - 95.58% (324 deals)

PE Growth/Expansion - 2.06% (7 deals)

Early Stage VC - 0.88% (3 deals)

Secondary Transaction - Private - 0.88% (3 deals)

Total Deals - 339

Industry

All Years - Targeted

Financial Services - 48.17% (435 deals)

Past 5 Years - Targeted

Financial Services - 56.64% (192 deals)

All Years - Targeted

Information Technology - 20.04% (181 deals)

Business Products and Services (B2B) - 18.94% (171 deals)

Total Deals - 903

Past 5 Years - Targeted

Information Technology - 18.29% (62 deals)

Business Products and Services (B2B) - 14.16% (48 deals)

Total Deals - 339

Geography

All Years - Regional

United States - 71.65% (647 deals)

Europe - 14.62% (132 deals)

North America - 12.07% (109 deals)

Total Deals - 903

Past 5 Years - Regional

United States - 73.16% (248 deals)

Europe - 15.04% (51 deals)

North America - 9.73% (33 deals)

Total Deals - 339

Contact Information

Primary Contact

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Top 25 Current Team

Name	Title	Deals	Funds	Boards	Office	Contact
Patrick Healy	Chief Executive Officer, Member of the Investment Committee & Chairman of the Compensation Committee	31	9	2	London, United Kingdom	+44 (0)20 7839 5111 patrick@hf.com
Judd Sher JD	Chief Financial Officer & Partner		1		San Francisco, CA	+1 (415) 788-5111 judd@hf.com
Will Loomis	Chief Technology Officer				San Francisco, CA	+1 (415) 788-5111 wloomis@hf.com
Adam Laursen	Managing Director				San Francisco, CA	+1 (415) 788-5111 alaursen@hf.com
Emily Johnson	Managing Director				San Francisco, CA	+1 (415) 788-5111 ejohnson@hf.com
Lauren Cummings	Managing Director				San Francisco, CA	+1 (415) 788-5111 lcummings@hf.com
Sean O'Brien	Managing Director				New York, NY	+1 (212) 871-6680 sobrien@hf.com
Ted Akiskalos	Managing Director				London, United Kingdom	+44 (0)20 7839 5111 ted@hf.com
Arrie Park JD	Partner & Chief Legal Officer		2		San Francisco, CA	+1 (415) 788-5111 arrie@hf.com
Allen Thorpe	Partner & Member of the Investment Committee	36	10	2	New York, NY	+1 (212) 871-6680 kevin.malloy@lifetimecardinal.com
David Tunnell	Partner & Member of the Investment Committee	512	10	2	San Francisco, CA	+1 (415) 788-5111 dtunnell@hf.com
Stuart Banks	Partner & General Counsel, Europe				London, United Kingdom	+44 (0)20 7839 5111 stuart.banks@hf.com
Susanna Daniels	Partner & Head of Investor Relations				San Francisco, CA	+1 (415) 788-5111 sdaniels@hf.com

Name	Title	Deals	Funds	Boards	Office	Contact
Adrien Motte	Partner	1	1	2	London, United Kingdom	+44 (0)20 7839 5111 adrien@hf.com
Benjamin Farkas	Partner	3	1	1	New York, NY	+1 (212) 871-6680 bfarkas@hf.com
Blake Kleinman	Partner	59	7	1	London, United Kingdom	+44 (0)20 7839 5111 blake@hf.com
Brian Doyle	Partner		1		San Francisco, CA	+1 (415) 788-5111 brian@hf.com
Gary Bischooping Jr.	Partner				New York, NY	+1 (212) 871-6680 gbischooping@hf.com
Hunter Philbrick	Partner	6	3	2	New York, NY	+1 (212) 871-6680 hunter@hf.com
Jacob Best	Partner			1	San Francisco, CA	+1 (415) 788-5111 jbest@hf.com
Johannes Korp	Partner				London, United Kingdom	+44 (0)20 7839 5111 johannes@hf.com
Matt Eisen	Partner	7	2	1	San Francisco, CA	+1 (415) 788-5111 meisen@hf.com
Sameer Narang	Partner	3	1	1	San Francisco, CA	+1 (415) 788-5111 snarang@hf.com
Stefan Goetz	Partner	2	2	1	London, United Kingdom	+44 (0)20 7839 5111 sgoetz@hf.com
Stephen Ensley	Partner	5		4	San Francisco, CA	+1 (415) 788-5111 sensley@hf.com

Top 25 Current Board Seats

Name	Role	Company	Industry	Location	Since	Phone	Email
Stephen Ensley	Board Member	Zendesk	Business/Productivity Software	San Francisco, CA	Nov 2022	+1 (415) 788-5111	sensley@hf.com
Tarim Wasim	Board Member	Zendesk	Business/Productivity Software	San Francisco, CA	Nov 2022	+1 (415) 788-5111	tarim@hf.com
Blake Kleinman	Board Member	Circana	Media and Information Services (B2B)	Chicago, IL	Nov 2021	+44 (0)20 7839 5111	blake@hf.com
Joseph Ghobrial	Board Member	Circana	Media and Information Services (B2B)	Chicago, IL	Nov 2021	+1 (415) 788-5111	jghobrial@hf.com
Philip Hammarskjold	Board Member	Circana	Media and Information Services (B2B)	Chicago, IL	Nov 2021	+1 (415) 788-5111	phammarskjold@hf.com
Sameer Narang	Board Member	PointClickCare	Enterprise Systems (Healthcare)	Toronto, Canada	Dec 2020	+1 (415) 788-5111	snarang@hf.com
Hunter Philbrick	Board Member	Vantage Risk	Commercial/Professional Insurance	Pembroke, Bermuda	Nov 2020	+1 (212) 871-6680	hunter@hf.com
Tarim Wasim	Board Member	Checkmarx	Software Development Applications	Paramus, NJ	Apr 2020	+1 (415) 788-5111	tarim@hf.com
Allen Thorpe	Board Member and Lead Director	Claritev	Practice Management (Healthcare)	McLean, VA	Jan 2020	+1 (212) 871-6680	kevin.malloy@lifetimcardinal.com
Matt Eisen	Board Member	Caliber Collision	Automotive	Lewisville, TX	Jan 2019	+1 (415) 788-5111	meisen@hf.com
Adrien Motte	Board Member	SimpliSafe	Electronics (B2C)	Boston, MA	Aug 2018	+44 (0)20 7839 5111	adrien@hf.com

Name	Role	Company	Industry	Location	Since	Phone	Email
Stephen Ensley	Board Member	Genesys	Business/Productivity Software	Menlo Park, CA	Jan 2016	+1 (415) 788-5111	sensley@hf.com
Charles Dickson	Board Member & Chairman of Audit Committee	Hub International	Insurance Brokers	Chicago, IL	Jan 2014		
Erik Ragatz	Board Member	Grocery Outlet Holding	Department Stores	Emeryville, CA	Jan 2014	+1 (888) 501-1217	
Adrien Motte	Board Member	Verisure	Other Services (B2C Non-Financial)	Versoix, Switzerland	Sep 2011	+44 (0)20 7839 5111	adrien@hf.com
Patrick Healy	Board Member	Verisure	Other Services (B2C Non-Financial)	Versoix, Switzerland	Sep 2011	+44 (0)20 7839 5111	patrick@hf.com
Stefan Goetz	Chairman	Verisure	Other Services (B2C Non-Financial)	Versoix, Switzerland	Sep 2011	+44 (0)20 7839 5111	sgoetz@hf.com
John Bunce Jr.	Board Member, Chairman of Nominating and Governance Committee and Member of Compensation Committee, Executive Committee, Finance, Investment and Risk Committee	Arch Capital Group	Commercial/Professional Insurance	Hamilton, Bermuda	Jan 2001	+1 (208) 727-6966	jbunce@greyhawkcm.com
Adam Halpern-Leistner	Board Member	Hub International	Insurance Brokers	Chicago, IL		+1 (212) 871-6680	adamhl@hf.com
Annmarie Neal	Board Member	Snap One	Other Commercial Services	Charlotte, NC		+1 (415) 418-7506	annmarie.neal@zendesk.com
David Tunnell	Board Member	UKG	Business/Productivity Software	Lowell, MA		+1 (415) 788-5111	dtunnell@hf.com

Name	Role	Company	Industry	Location	Since	Phone	Email
David Tunnell	Board Member	Genesys	Business/Productivity Software	Menlo Park, CA		+1 (415) 788-5111	dtunnell@hf.com
Hunter Philbrick	Board Member	Hub International	Insurance Brokers	Chicago, IL		+1 (212) 871-6680	hunter@hf.com
Jacob Best	Board Member	Snap One	Other Commercial Services	Charlotte, NC		+1 (415) 788-5111	jbest@hf.com
Stephen Ensley	Board Member	Checkmarx	Software Development Applications	Paramus, NJ		+1 (415) 788-5111	sensley@hf.com

Current Board Members (3)

Name	Title	Representing	Role	Since	Phone	Email
Guillaume van Moerbeke	Board Member & Advisor	Hellman & Friedman	Board Member & Advisor	Jan 2014	+44 (0)20 7839 5111	gvanmoerbeke@hf.com
Patrick Healy	Chief Executive Officer, Member of the Investment Committee & Chairman of the Compensation Committee	Hellman & Friedman	Chief Executive Officer, Member of the Investment Committee & Chairman of the Compensation Committee	Jan 1994	+44 (0)20 7839 5111	patrick@hf.com
Philip Hammarskjold	Executive Chairman	Hellman & Friedman	Executive Chairman	Jan 1992	+1 (415) 788-5111	phammarskjold@hf.com

Top 25 Lead Partners on Deals

Name	All Deals	Deals	Industry	Location	Phone	Email
Blake Kleinman	59	Moss Adams #1. Buyout/LBO: Jun 2025, \$7.00B, Completed	Accounting, Audit and Tax Services (B2B)	Seattle, WA	+44 (0)20 7839 5111	blake@hf.com
Stephen Ensley	5	Local Measure International #4. Buyout/LBO: May 2025, Completed	Media and Information Services (B2B)	Surry Hills, Australia	+1 (415) 788-5111	sensley@hf.com
Hunter Philbrick	6	MediGroup #3. Buyout/LBO: Apr 2025, Announced	Hospitals/Inpatient Services	New Belgrade, Serbia	+1 (212) 871-6680	hunter@hf.com
Hunter Philbrick	6	Mehiläinen #16. PE Growth/Expansion: Apr 2025, Completed	Clinics/Outpatient Services	Helsinki, Finland	+1 (212) 871-6680	hunter@hf.com
Blake Kleinman	59	Hayflich CPAs #1. Buyout/LBO: Feb 2025, Completed	Accounting, Audit and Tax Services (B2B)	Huntington, WV	+44 (0)20 7839 5111	blake@hf.com
Blake Kleinman	59	Golden Soft #1. Buyout/LBO: Feb 2025, Completed	Business/Productivity Software	Madrid, Spain	+44 (0)20 7839 5111	blake@hf.com
Blake Kleinman	59	CironeFriedberg #1. Buyout/LBO: Feb 2025, Completed	Accounting, Audit and Tax Services (B2B)	Bethel, CT	+44 (0)20 7839 5111	blake@hf.com
David Tunnell	512	Yavitz Insurance Group #1. Buyout/LBO: Feb 2025, Completed	Insurance Brokers	Saint Louis, MO	+1 (415) 788-5111	dtunnell@hf.com
David Tunnell	512	Mayfield Insurance #1. Buyout/LBO: Feb 2025, Completed	Insurance Brokers	Mooresville, IN	+1 (415) 788-5111	dtunnell@hf.com
David Tunnell	512	DAR The Rocchio Agency #1. Buyout/LBO: Feb 2025, Completed	Insurance Brokers	Carmel, IN	+1 (415) 788-5111	dtunnell@hf.com
David Tunnell	512	Lindenwood Agency #1. Buyout/LBO: Feb 2025, Completed	Insurance Brokers	Saint Charles, MO	+1 (415) 788-5111	dtunnell@hf.com
David Tunnell	512	Legacy Planning Partners #1. Buyout/LBO: Jan 2025, Completed	Other Financial Services	Allentown, PA	+1 (415) 788-5111	dtunnell@hf.com
Blake Kleinman	59	The Quarters Columbia #1. Buyout/LBO: Jan 2025, Completed	Real Estate Services (B2C)	Columbia, MO	+44 (0)20 7839 5111	blake@hf.com

Name	All Deals	Deals	Industry	Location	Phone	Email
David Tunnell	512	Byrnes Agency Insurance #2. Buyout/LBO: Jan 2025, Completed	Insurance Brokers	Dayville, CT	+1 (415) 788-5111	dtunnell@hf.com
David Tunnell	512	Woods Insurance Service #2. Buyout/LBO: Dec 2024, Completed	Insurance Brokers	Farmington, NM	+1 (415) 788-5111	dtunnell@hf.com
Philip Hammarskjold	12	The Nielsen Company (Marketing Mix Modeling Business Division) #1. Buyout/LBO: Dec 2024, Completed	Media and Information Services (B2B)		+1 (415) 788-5111	phammarskjold@hf.com
Blake Kleinman	59	Morning (Tel Aviv) #2. Buyout/LBO: Dec 2024, \$150.00M, Completed	Business/Productivity Software	Tel Aviv, Israel	+44 (0)20 7839 5111	blake@hf.com
David Tunnell	512	Great Basin Insurance #2. Buyout/LBO: Dec 2024, Completed	Insurance Brokers	Klamath Falls, OR	+1 (415) 788-5111	dtunnell@hf.com
Blake Kleinman	59	Trader #11. Buyout/LBO: Dec 2024, \$2.84B, Completed	Automotive	Etobicoke, Canada	+44 (0)20 7839 5111	blake@hf.com
David Tunnell	512	Jackson Hole Insurance #1. Buyout/LBO: Dec 2024, Completed	Insurance Brokers	Jackson, WY	+1 (415) 788-5111	dtunnell@hf.com
David Tunnell	512	Otter Insurance Agency #1. Buyout/LBO: Dec 2024, Completed	Insurance Brokers	Lynnwood, WA	+1 (415) 788-5111	dtunnell@hf.com
David Tunnell	512	Hadfield Agency #1. Buyout/LBO: Dec 2024, Completed	Insurance Brokers	Little Rock, AR	+1 (415) 788-5111	dtunnell@hf.com
David Tunnell	512	Fairfield County Bank Insurance Services #1. Buyout/LBO: Dec 2024, Completed	Insurance Brokers	Ridgefield, CT	+1 (415) 788-5111	dtunnell@hf.com
Blake Kleinman	59	Muscope #3. Buyout/LBO: Nov 2024, Completed	Network Management Software	Milan, Italy	+44 (0)20 7839 5111	blake@hf.com
David Tunnell	512	R.K. Gore & Associates #1. Buyout/LBO: Nov 2024, Completed	Insurance Brokers	Lehi, UT	+1 (415) 788-5111	dtunnell@hf.com

All Investments & M&A (911)

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Sellsy	24-Sep-2025	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	
xtream	18-Sep-2025	Buyout/LBO (Add-on) [†]		4	Generating Revenue	IT Consulting and Outsourcing	
Cytora	09-Sep-2025	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Financial Software	
Stile	17-Jul-2025	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Educational Software	
ClicData	03-Jul-2025	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	
KraftCPAs	26-Jun-2025	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Accounting, Audit and Tax Services (B2B)	
Sockeye Business Solutions	18-Jun-2025	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	
ADT México	16-Jun-2025	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Commercial Services	
HyperArc	14-Jun-2025	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Business/Productivity Software	
Veripax Wealth Management	09-Jun-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Consulting Services (B2B)	
Wycoff Insurance Agency	05-Jun-2025	Buyout/LBO (Add-on) [†]		8	Generating Revenue	Insurance Brokers	
Scott Held Insurance Agency	04-Jun-2025	Buyout/LBO (Add-on) [†]		8	Generating Revenue	Insurance Brokers	
Fenner & Esler Agency	03-Jun-2025	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	
Moss Adams	03-Jun-2025	Buyout/LBO (Add-on) [†]	\$7.00B	2	Generating Revenue	Accounting, Audit and Tax Services (B2B)	Blake Kleinman
Shiftboard	30-May-2025	Buyout/LBO (Add-on) [†]		7	Generating Revenue	Business/Productivity Software	
9Lives Kotipalvelut	29-May-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Elder and Disabled Care	

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Local Measure International	20-May-2025	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Media and Information Services (B2B)	Stephen Ensley
Fifth Avenue Agency	16-May-2025	Buyout/LBO (Add-on) [†]		8	Generating Revenue	Insurance Brokers	
Prestige Wealth Partners (Florida)	08-May-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	
Demarie Insurance Agency	07-May-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Commercial/Professional Insurance	
Guru of Insurance	06-May-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	
Allegiant Global Partners	05-May-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Consulting Services (B2B)	
Cahill Wealth Management	05-May-2025	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Commercial Services	
Andbank Distribuidora de Títulos e Valores Mobiliários	29-Apr-2025	Buyout/LBO		1	Generating Revenue	Other Commercial Services	
Employee Benefit Associates	08-Apr-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Insurance	
Meyer & Rosenbaum	07-Apr-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	
Henriott Group	01-Apr-2025	Buyout/LBO (Add-on) [†]		8	Generating Revenue	Insurance Brokers	
MediGroup	01-Apr-2025	Buyout/LBO (Secondary) [†]		5	Generating Revenue	Hospitals/ Inpatient Services	Hunter Philbrick
Mehiläinen	01-Apr-2025	PE Growth/Expansion			Generating Revenue	Clinics/Outpatient Services	Hunter Philbrick
Regina Maria	01-Apr-2025	Buyout/LBO (Secondary) [†]	\$1.19B	5	Generating Revenue	Hospitals/ Inpatient Services	
Millesimo	31-Mar-2025	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	
Invoke Tax Partners	27-Mar-2025	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Accounting, Audit and Tax Services (B2B)	

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Jordan Sibling (Retirement and Private Wealth Books of Business)	07-Mar-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	
Drayton Valley Insurance Agency	06-Mar-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	
Miv Insurance	05-Mar-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	
Dansig	01-Mar-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	
Pure Aesthetics	28-Feb-2025	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Services (B2C Non-Financial)	
Golden Soft	27-Feb-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Business/Productivity Software	Blake Kleinman
Hayflich CPAs	27-Feb-2025	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Accounting, Audit and Tax Services (B2B)	Blake Kleinman
CironeFriedberg	11-Feb-2025	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Accounting, Audit and Tax Services (B2B)	Blake Kleinman
Yavitz Insurance Group	10-Feb-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Mayfield Insurance	07-Feb-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
DAR The Rocchio Agency	06-Feb-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Lindenwood Agency	05-Feb-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Hancock Askew & Co.	03-Feb-2025	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Accounting, Audit and Tax Services (B2B)	
Pearl Street Technologies	01-Feb-2025	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	
Legacy Planning Partners	29-Jan-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	David Tunnell
The Quarters Columbia	22-Jan-2025	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Real Estate Services (B2C)	Blake Kleinman

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Byrnes Agency Insurance	09-Jan-2025	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
The Nielsen Company (Marketing Mix Modeling Business Division)	31-Dec-2024	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Media and Information Services (B2B)	Philip Hammarskjold
Woods Insurance Service	31-Dec-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Morning (Tel Aviv)	22-Dec-2024	Buyout/LBO (Add-on) [†]	\$150.00M	5	Generating Revenue	Business/Productivity Software	Blake Kleinman
Great Basin Insurance	17-Dec-2024	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Jackson Hole Insurance	12-Dec-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Trader	12-Dec-2024	Buyout/LBO (Secondary) [†]	\$2.84B	1	Generating Revenue	Automotive	Blake Kleinman
Otter Insurance Agency	11-Dec-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Hadfield Agency	09-Dec-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Fairfield County Bank Insurance Services	01-Dec-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Muscope	18-Nov-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Network Management Software	Blake Kleinman
R.K. Gore & Associates	13-Nov-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Anco Insurance Managers	11-Nov-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Global Ag Risk Solutions	05-Nov-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Western Growers Insurance Services	04-Nov-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Western Growers Insurance Services (Retail Insurance Brokerage Business)	04-Nov-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Alirrium	01-Nov-2024	Buyout/LBO (Add-on) [†]		1	Generating Revenue	IT Consulting and Outsourcing	Blake Kleinman
WestStar Insurance	09-Oct-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Associated Insurance Group (Missouri)	08-Oct-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Creative Financial Strategies	07-Oct-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	David Tunnell
Global Music Rights	18-Sep-2024	Buyout/LBO			Generating Revenue	Legal Services (B2C)	
Distrito K	17-Sep-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Business/Productivity Software	Blake Kleinman
Felton et Associes Assurances	09-Sep-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Flexible Benefits Plans	05-Sep-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Dürkop (Kassel)	01-Sep-2024	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	
Clark 401k Consulting	08-Aug-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Consulting Services (B2B)	David Tunnell
Southern Colorado Insurance Center	07-Aug-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Insurance Management Company	06-Aug-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Ecolab (Global Surgical Solutions)	01-Aug-2024	Buyout/LBO (Add-on) [†]	\$950.00M	5	Generating Revenue	Surgical Devices	Allen Thorpe
Planck	23-Jul-2024	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	David Tunnell
Wade Associates	22-Jul-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
McClements Insurance Services	19-Jul-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
2837932 Ontario	17-Jul-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Commercial Products	David Tunnell
TAS Insurance Services	16-Jul-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Insurance	David Tunnell
Safe-Guard Products International	15-Jul-2024	Buyout/LBO (Secondary)			Profitable	Road	Hunter Philbrick
Swanson and Swanson Insurance	15-Jul-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Integrated Benefits Group Insurance Brokerage	12-Jul-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Wyatt Insurance Services	10-Jul-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
TeamSystem	08-Jul-2024	Secondary Transaction - Private			Profitable	Business/Productivity Software	
Clémentine	01-Jul-2024	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Financial Software	Blake Kleinman
Seiler	01-Jul-2024	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Accounting, Audit and Tax Services (B2B)	Blake Kleinman
Skinner & Company	01-Jul-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Change Capital	25-Jun-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Financial Software	Blake Kleinman
BidOut	21-Jun-2024	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Benjamin Farkas
Meyers Glaros	10-Jun-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Symphony Financial & Insurance Services	06-Jun-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	David Tunnell
Combined HCM	05-Jun-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Human Capital Services	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Essex Agency	04-Jun-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Soundmark Wealth Management	13-May-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	Allen Thorpe
2197747 Alberta Ltd (Certain Assets in Alberta)	08-May-2024	Buyout/LBO [†]		5	Generating Revenue	Buildings and Property	David Tunnell
True North Group Insurance Services	07-May-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
William R. Cargill Insurance Agency	06-May-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Merriwether & Williams Insurance Services	02-May-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Pollock Insurance	04-Apr-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Insurance	David Tunnell
Sale Insurance Agency	03-Apr-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Ultimate (Automation/Workflow Software)	13-Mar-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Automation/ Workflow Software	Stephen Ensley
AG Cuffill	07-Mar-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Medical Supplies	Allen Thorpe
Preferred Services Group	06-Mar-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Poker (Italy)	01-Mar-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Business/Productivity Software	Blake Kleinman
Klaus	12-Feb-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Business/Productivity Software	Stephen Ensley
Baker Tilly (Chicago)	07-Feb-2024	Buyout/LBO	\$1.00B	1	Generating Revenue	Accounting, Audit and Tax Services (B2B)	Blake Kleinman
Radarr	02-Feb-2024	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Business/Productivity Software	Tarim Wasim
Golf Datatech	31-Jan-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Media and Information Services (B2B)	Philip Hammarskjold

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
American HealthTech	16-Jan-2024	Buyout/LBO (Add-on) [†]		6	Profitable	Enterprise Systems (Healthcare)	
United Medco	10-Jan-2024	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Distributors (Healthcare)	Allen Thorpe
New England Pension Plan Systems	14-Dec-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Asset Management	Allen Thorpe
^x Cortex (Healthcare Technology Systems)	07-Dec-2023	PE Growth/Expansion	\$133.00M	2	Generating Revenue	Outcome Management (Healthcare)	
SoapBox Labs	22-Nov-2023	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Educational Software	
PRW Wealth Management	16-Nov-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	Allen Thorpe
Auto Body Innovations	19-Oct-2023	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Services (B2C Non-Financial)	Matt Eisen
Asset Protection Group (Midlothian)	16-Oct-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
D'Onofrio Insurance	13-Oct-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Great Basin Insurance Eugene	04-Oct-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Align Wealth Management	03-Oct-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Asset Management	Allen Thorpe
CoverWallet (Certain Assets in United States)	30-Sep-2023	Buyout/LBO [†]	\$38.00M	5		Buildings and Property	David Tunnell
PrefConnect	21-Sep-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Outcome Management (Healthcare)	Allen Thorpe
GJJK	07-Sep-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
F.A.R.E. Healthcare	06-Sep-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Life and Health Insurance	David Tunnell
Shinstrom & Norman	10-Aug-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Horizon Insurance	09-Aug-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Assured Risk Advisors	03-Aug-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Golden Ears Insurance Services	02-Aug-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Mikro Yazilim	28-Jul-2023	Buyout/LBO (Secondary) [†]		1	Generating Revenue	Software Development Applications	Blake Kleinman
Edbrooke/Stelcner and Associates	17-Jul-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Human Capital Services	David Tunnell
Acumbamail	13-Jul-2023	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Media and Information Services (B2B)	Blake Kleinman
ContactLab	13-Jul-2023	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Globase International	12-Jul-2023	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Golden Corner Wealth Advisors	07-Jul-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Asset Management	David Tunnell
Frinell Risk Advisors	06-Jul-2023	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Other Insurance	David Tunnell
Immedis	01-Jul-2023	Buyout/LBO (Add-on) [†]	\$596.52M	6	Generating Revenue	Business/Productivity Software	David Tunnell
Tymeshift	22-Jun-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Business/Productivity Software	Stephen Ensley
CRCL Solutions	16-Jun-2023	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Media and Information Services (B2B)	Benjamin Farkas
Business Benefits Resource	08-Jun-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Human Capital Services	David Tunnell
Custom Results Corporate Consulting	08-Jun-2023	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Health Insurance Consultants	08-Jun-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Johnston Lewis Associates	08-Jun-2023	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Joseph Aiello & Associates	08-Jun-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Legal Services (B2B)	David Tunnell
E-Insure Services	07-Jun-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Financial Software	David Tunnell
HORAN Health	01-Jun-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Human Capital Services	David Tunnell
Ibex Enterprises (Life and Health Assets)	01-Jun-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Life and Health Insurance	David Tunnell
Aplifisa	23-May-2023	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Business/Productivity Software	Blake Kleinman
The Wooditch Company	02-May-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Greenext Technologies	01-May-2023	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Business/Productivity Software	Blake Kleinman
Weiss-Schantz Agency	13-Apr-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Red Rock Financial	10-Apr-2023	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Defranco Insurance	06-Apr-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Readytec	06-Apr-2023	Buyout/LBO (Add-on) [†]		2	Generating Revenue	IT Consulting and Outsourcing	Blake Kleinman
Hobson Insurance	05-Apr-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Horizon Agency	04-Apr-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Brady Risk Management	01-Apr-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Microntel	20-Mar-2023	Buyout/LBO (Add-on) [†]		2	Generating Revenue	IT Consulting and Outsourcing	Blake Kleinman

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Multidata	13-Mar-2023	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Patient Pattern	13-Mar-2023	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Medical Records Systems	
Glacier Insurance of Libby	03-Mar-2023	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Dwight W. Andrus Insurance (Assets in Louisiana)	02-Mar-2023	Buyout/LBO [†]	\$190.00M	6	Generating Revenue	Buildings and Property	David Tunnell
AG Direct Hail Insurance	23-Feb-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Canadian Hail Agencies	23-Feb-2023	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Puzzle Medical Devices	07-Feb-2023	Later Stage VC (Series A)	\$25.00M	10	Clinical Trials - Phase 1	Therapeutic Devices	Duke Rohlen
Ignite Reading	17-Jan-2023	Early Stage VC (Series A)	\$10.00M	8	Generating Revenue	Educational and Training Services (B2C)	
Creative Benefits & Insurance Solutions	11-Jan-2023	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Stat Health Care	11-Jan-2023	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Clinics/Outpatient Services	Allen Thorpe
Coast to Coast Insurance Brokers	10-Jan-2023	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
OSA Insurance Brokerage Services	05-Jan-2023	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
MedAlliance (Drug Delivery)	01-Jan-2023	Buyout/LBO (Add-on) [†]	\$1.14B	4	Generating Revenue	Drug Delivery	Hunter Philbrick
Chatham Insurance Partners	14-Dec-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Dale Barton Agency	12-Dec-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
AM Insurance Services of Miami	08-Dec-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Risk Handler Software	06-Dec-2022	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Financial Software	David Tunnell
Invensure Insurance Brokers	01-Dec-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Zendesk	22-Nov-2022	Buyout/LBO	\$10.20B	5	Profitable	Business/Productivity Software	Stephen Ensley
Bridgecreek Investment Management	10-Nov-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Asset Management	David Tunnell
Priority Insurance Associates	03-Nov-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Quorbit	03-Nov-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Business/Productivity Software	David Tunnell
ITReview	18-Oct-2022	Buyout/LBO (Add-on) [†]		2	Generating Revenue	IT Consulting and Outsourcing	Blake Kleinman
Advisory Businesses Of Quintes	06-Oct-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Guide Insurance Services	05-Oct-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Herrmann & Cooke Wealth Management	05-Oct-2022	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Financial Services	Allen Thorpe
Tilghman Insurance of Myrtle Beach	08-Sep-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Direct Advisors	07-Sep-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Office Services (B2B)	David Tunnell
Scheiben-Doktor	06-Sep-2022	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Automotive	
Winter Harbor Insurance Group	25-Aug-2022	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Miniter Group	17-Aug-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Insurance	David Tunnell
Jaimac Risk Management	12-Aug-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Tarmika	12-Aug-2022	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Financial Software	David Tunnell
Intercontinental Growth Strategies	08-Aug-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
KT&D	05-Aug-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Bubrig Insurance Agency	04-Aug-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Wealthplan Advisors	03-Aug-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Asset Management	David Tunnell
Information Resources	01-Aug-2022	Buyout/LBO (Secondary) [†]	\$8.00B	1	Profitable	Media and Information Services (B2B)	Philip Hammarskjold
Grace & Porta Benefits	27-Jul-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Stop Loss Insurance Brokers	27-Jul-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Shaver-Robichaux Agency	08-Jul-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Compass Insurance Services	07-Jul-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Heritage Wealth Management Group	20-Jun-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Financial Services	David Tunnell
Physicians Risk Associates Insurance Agency	07-Jun-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
CSi Advisory Services	06-Jun-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Consulting Services (B2B)	David Tunnell
Sandy Spring Insurance	01-Jun-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
APEX Global Benefit Management System	06-May-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	IT Consulting and Outsourcing	David Tunnell
Great North Insurance Services	05-May-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Autocristal Sevilla	04-May-2022	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Distributors/Wholesale	
Williford Insurance Group	04-May-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Life and Health Insurance	David Tunnell
Hanson Insurance Group	03-May-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
PointClickCare	22-Apr-2022	Secondary Transaction - Private		1	Generating Revenue	Enterprise Systems (Healthcare)	Sameer Narang
EVO Insurance Services	12-Apr-2022	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Multi-line Insurance	David Tunnell
Circana	11-Apr-2022	Buyout/LBO (Secondary)		1	Generating Revenue	Media and Information Services (B2B)	Joseph Ghobrial
Peel & Holland	10-Apr-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Marketing Management Associates	08-Apr-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Commercial/Professional Insurance	David Tunnell
401(k) Advisors	06-Apr-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	David Tunnell
JAG Insurance Group	05-Apr-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Chun-Ha Insurance Services	04-Apr-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Autoproff	28-Mar-2022	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Blake Kleinman
Audacious Inquiry	16-Mar-2022	Buyout/LBO (Add-on) [†]	\$248.34M	5	Generating Revenue	Enterprise Systems (Healthcare)	
Midland Agency Insurance	11-Mar-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Ascentis	09-Mar-2022	Buyout/LBO (Secondary) [†]		6	Generating Revenue	Business/Productivity Software	David Tunnell
Niedermeyer Risk Management	09-Mar-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Kuhl Insurance	07-Mar-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Western Assurance	04-Mar-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Taylor Advisors	02-Mar-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Financial Services	David Tunnell
Insureon	01-Mar-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
^x Splunk	22-Feb-2022	PIPE	\$1.40B ^E		Generating Revenue	Business/Productivity Software	
Storeden	14-Feb-2022	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Internet Retail	Blake Kleinman
Vantage Risk	08-Feb-2022	PE Growth/Expansion	\$200.00M	1	Generating Revenue	Commercial/Professional Insurance	Hunter Philbrick
Vantage Risk Assurance Company	08-Feb-2022	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Re-Insurance	
Kornerstone	02-Feb-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	David Tunnell
Cristalbox	28-Jan-2022	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Automotive	
Curriculum Associates	21-Jan-2022	PE Growth/Expansion		1	Generating Revenue	Publishing	
Sedas	20-Jan-2022	Buyout/LBO (Add-on) [†]		2	Generating Revenue	IT Consulting and Outsourcing	Blake Kleinman
Raffa Financial Services	06-Jan-2022	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Interboro Systems Corporation	01-Jan-2022	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Business/Productivity Software	David Tunnell
SpotCues	01-Jan-2022	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	David Tunnell
Belron	17-Dec-2021	Secondary Transaction - Private	\$3.03B ^E	3	Generating Revenue	Automotive	

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
The Spofford Group	17-Dec-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Well (Other Healthcare Technology Systems)	17-Dec-2021	Early Stage VC (Series B)	\$71.90M	5	Generating Revenue	Other Healthcare Technology Systems	
JP Griffin Group	15-Dec-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Consulting Services (B2B)	David Tunnell
GRP Financial California	14-Dec-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Commercial Services	David Tunnell
Basi Insurance Services	13-Dec-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Benefit Partners Group (Certain Assets of Libertyville)	10-Dec-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Insurance	David Tunnell
Tatman's Carstar	10-Dec-2021	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Automotive	Matt Eisen
Gold Sky Benefits	09-Dec-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Consulting Services (B2B)	David Tunnell
Gregory Benefits & Consulting	08-Dec-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Shepard Walton King Insurance	07-Dec-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Shattuck & Grummett Insurance	03-Dec-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Catto & Catto	02-Dec-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Exceed.AI	01-Dec-2021	Buyout/LBO (Add-on) [†]	\$35.00M	3	Generating Revenue	Business/Productivity Software	Tarim Wasim
Fiducia Group	01-Dec-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Consulting Services (B2B)	David Tunnell
Pointillist	01-Dec-2021	Buyout/LBO (Add-on) [†]	\$150.00M	4	Generating Revenue	Business/Productivity Software	Tarim Wasim
Athenahealth	26-Nov-2021	Buyout/LBO (Secondary)	\$17.00B	5	Generating Revenue	Enterprise Systems (Healthcare)	Allen Thorpe

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Logical Soft	04-Nov-2021	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Rider Insurance Group	04-Nov-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Zooplus (Specialty Retail)	03-Nov-2021	Buyout/LBO (Secondary)	\$3.48B	1	Profitable	Specialty Retail	
Calculated Risk Advisors	01-Nov-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Tanna Insurance	01-Nov-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Rogersworks	18-Oct-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
AutoNation (17 Collision Centers)	12-Oct-2021	Buyout/LBO [†]		2		Buildings and Property	Matt Eisen
Safe Harbor Group	12-Oct-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Jerry Baird Insurance Agency	11-Oct-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Verity Insurance Services	08-Oct-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
H.W. Hollinger	06-Oct-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
National Home Warranty Group	04-Oct-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
EPG Insurance Agency	01-Oct-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Itacme Informatica	01-Oct-2021	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Business/Productivity Software	Blake Kleinman
Purselley Associates	20-Sep-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Insurance	David Tunnell
McNellis & Company	08-Sep-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Great Place to Work Institute	01-Sep-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Consulting Services (B2B)	David Tunnell
Millennium Advisory Services	27-Aug-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Financial Services	David Tunnell
Dissinger Reed	16-Aug-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Insurance	David Tunnell
Dustico	05-Aug-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Network Management Software	Tarim Wasim
Hiles-McLeod Insurance	05-Aug-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Cordis	02-Aug-2021	Buyout/LBO	\$1.00B	3	Generating Revenue	Therapeutic Devices	Hunter Philbrick
At Home Stores	23-Jul-2021	Buyout/LBO	\$2.80B		Bankruptcy: Admin/Reorg	Specialty Retail	Erik Ragatz
Risk Point Consulting	16-Jul-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Insurance	David Tunnell
Pete Webb Agency	09-Jul-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Commercial/Professional Insurance	David Tunnell
First Florida Insurance	08-Jul-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Ward Insurance	06-Jul-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Aegis Retirement Group	01-Jul-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Financial Services	David Tunnell
Trusted Capital Group	01-Jul-2021	Buyout/LBO (Add-on) [†]		7	Generating Revenue	Asset Management	David Tunnell
Enverus	10-Jun-2021	Buyout/LBO (Secondary)	\$4.25B		Generating Revenue	Business/Productivity Software	Benjamin Farkas
EnterMedicare	08-Jun-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Insurance	David Tunnell
Beacon Hill Wealth Services (Retirement and Private Wealth Book of Business)	07-Jun-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Asset Management	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Medline Industries	05-Jun-2021	Buyout/LBO	\$34.00B	4	Generating Revenue	Medical Supplies	Allen Thorpe
Salvatore Insurance Brokers	04-Jun-2021	Buyout/LBO (Add-on) [†]		4	Out of Business	Insurance Brokers	David Tunnell
Global Credit Risk Management	03-Jun-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Epstein Financial	02-Jun-2021	Buyout/LBO (Add-on) [†]		7	Generating Revenue	Other Financial Services	David Tunnell
EverythingBenefits	01-Jun-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	David Tunnell
Ion Insurance	10-May-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Access Networks	06-May-2021	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Wireless Communications Equipment	Erik Ragatz
Bold360	05-May-2021	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Tarim Wasim
Conover Insurance	05-May-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Cooper & Allison Insurance Agency	04-May-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Edelman Financial Engines	14-Apr-2021	PE Growth/Expansion		2	Profitable	Other Financial Services	
SimpliSafe	12-Apr-2021	PE Growth/Expansion	\$130.00M		Profitable	Electronics (B2C)	Adrien Motte
Wessex Financial	08-Apr-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
Wyoming Financial Insurance	07-Apr-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
KC Insurance Group	05-Apr-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Plan Sponsor Consultants	02-Apr-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Financial Services	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
HCA Distributing	01-Apr-2021	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Distributors/Wholesale	Erik Ragatz
IBG Financial Partners	01-Apr-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Financial Services	David Tunnell
Well (Other Healthcare Technology Systems)	17-Mar-2021	Early Stage VC (Series A)	\$50.93M	3	Generating Revenue	Other Healthcare Technology Systems	
EZLynx	09-Mar-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	David Tunnell
Juban Insurance Group	09-Mar-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Davis Trachtenberg	08-Mar-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Incentive Systems	05-Mar-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Consulting Services (B2B)	David Tunnell
Benefit Strategies Agency	04-Mar-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Commercial/Professional Insurance	David Tunnell
LivaNova	04-Mar-2021	Buyout/LBO		3	Profitable	Therapeutic Devices	
Sisqual WFM	04-Mar-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	Patrick Healy
Finn & Stone	03-Mar-2021	Buyout/LBO (Add-on) [†]		5	Out of Business	Insurance Brokers	David Tunnell
modeFinance	03-Mar-2021	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Other Financial Services	Blake Kleinman
Wellspring Insurance Agency	02-Mar-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Caliò Informatica	23-Feb-2021	Buyout/LBO (Add-on) [†]		2	Generating Revenue	IT Consulting and Outsourcing	Blake Kleinman
Sogesi	23-Feb-2021	Buyout/LBO (Add-on) [†]		2	Generating Revenue	IT Consulting and Outsourcing	Blake Kleinman
Billin	17-Feb-2021	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Financial Software	Blake Kleinman

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Software Del Sol	17-Feb-2021	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Financial Software	Blake Kleinman
Galon Insurance Brokers	02-Feb-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Shields Insurance Agency	19-Jan-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Commercial/Professional Insurance	David Tunnell
MPE Employee Benefit Services	18-Jan-2021	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Human Capital Services	David Tunnell
TeamSystem	15-Jan-2021	Buyout/LBO (Secondary)		1	Profitable	Business/Productivity Software	
Eagle American Insurance Agency (Mesa and Denver Operations)	14-Jan-2021	Buyout/LBO [†]		4		Buildings and Property	David Tunnell
Preferred Benefits Services Agency	12-Jan-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Consulting Services (B2B)	David Tunnell
Christiansen Insurance Group	11-Jan-2021	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Garnett Retirement Group	07-Jan-2021	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Consulting Services (B2B)	David Tunnell
Alpha Pension Group	31-Dec-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Financial Services	David Tunnell
Capax Management & Insurance Services	31-Dec-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Commercial Insurance Brokers	31-Dec-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Chelsea Insurance Agency	08-Dec-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Vantage Risk	03-Dec-2020	PE Growth/Expansion	\$1.00B	1	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Seymour Alper	02-Dec-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Financial Services	David Tunnell
Vitolo	16-Nov-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Larry Dean Massey	12-Nov-2020	Buyout/LBO [†]		4		Buildings and Property	David Tunnell
Baystate Fiduciary Advisors	11-Nov-2020	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Consulting Services (B2B)	David Tunnell
Stalco Insurance	04-Nov-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Insure All	01-Nov-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Olson Insurance Agency	01-Nov-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
United Shortline Insurance Services	01-Nov-2020	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Multi-line Insurance	David Tunnell
CCV Schweiz	21-Oct-2020	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Financial Software	Patrick Healy
Polskie ePłatności	14-Oct-2020	Buyout/LBO (Secondary) [†]	\$587.79M	7	Generating Revenue	Other Financial Services	Patrick Healy
Mumby Insurance (Property and Casualty and Employee Benefits Businesses)	08-Oct-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Bernstein Insurance	07-Oct-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Clearpoint Advisory Group	05-Oct-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
Sprinklr	09-Sep-2020	PE Growth/Expansion	\$650.00M	3	Profitable	Business/Productivity Software	Tarim Wasim
Todd and Associates (Louisiana)	09-Sep-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Charles R. Butler	08-Sep-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Hollis Companies	04-Sep-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Insurance	David Tunnell
Elevate Insurance Brokers	01-Sep-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
LeasingMarkt.de	05-Aug-2020	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Blake Kleinman
Gus Bates Insurance & Investments	06-Jul-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Ivari (MGA business)	02-Jul-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Commercial Services	David Tunnell
The Clements Agency	08-Jun-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
HB Consultants (Calgary)	03-Jun-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Usefulideas	02-Jun-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
Beneficy	29-May-2020	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Lashua Lachance and Poliks Insurance Agency	15-May-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Hatchett Insurance	14-May-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Vestas Financial Services	13-May-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Healy Benefits	12-May-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
The B&G Group	01-May-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
MBM Italia	08-Apr-2020	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Checkmarx	16-Mar-2020	Buyout/LBO (Secondary)	\$1.15B	2	Generating Revenue	Software Development Applications	Tarim Wasim
Harris Madden & Powell	10-Mar-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
LSM Insurance	05-Mar-2020	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Linton and Associates	04-Mar-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Barker Uerlings Insurance	03-Mar-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
nGUVU	03-Mar-2020	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Business/Productivity Software	Tarim Wasim
Morneau Shepell (Benefits Consulting business)	02-Mar-2020	Buyout/LBO (Add-on) [†]	\$70.00M	4	Generating Revenue	Other Financial Services	David Tunnell
AutoScout24	14-Feb-2020	Buyout/LBO	\$3.20B		Generating Revenue	Automotive	Blake Kleinman
Aldebra (Marketing Software Solutions and Consultancy Services)	11-Feb-2020	Buyout/LBO (Add-on) [†]		2	Generating Revenue	IT Consulting and Outsourcing	Blake Kleinman
Azur Consulting Services	10-Feb-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
Triester, Rossman and Associates	06-Feb-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Commercial Services	David Tunnell
Benefex Consulting	04-Feb-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
Area32	01-Feb-2020	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Kokkoris Insurance Services	23-Jan-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Strategic Benefit Resources	09-Jan-2020	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Consulting Services (B2B)	David Tunnell
Briargate Insurance Services	08-Jan-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Rhc Insurance Brokers	07-Jan-2020	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Arlo (European Commercial Operations)	02-Jan-2020	Buyout/LBO (Add-on) [†]	\$50.00M	5	Generating Revenue	Other Commercial Products	Patrick Healy

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
PointClickCare	01-Jan-2020	Secondary Transaction - Private	\$700.00M _E	1	Generating Revenue	Enterprise Systems (Healthcare)	Sameer Narang
Barrett & Associates (Indiana)	31-Dec-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Cranbrook Bloomfield Insurance Agency	31-Dec-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Poplatek (Espoo)	23-Dec-2019	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Financial Software	Patrick Healy
Poplatek Payments	23-Dec-2019	Buyout/LBO (Add-on) [†]		7	Generating Revenue	Financial Software	Patrick Healy
Commercial Line Book of Business (Montana)	10-Dec-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Blair Jarcik Insurance	05-Dec-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
Indio Technologies	05-Dec-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Financial Software	David Tunnell
SilverStone Group	04-Dec-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Financial Services	David Tunnell
HMBD Insurance Services	03-Dec-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Action Nederland	21-Nov-2019	Secondary Transaction - Private	\$1.94B		Generating Revenue	Department Stores	Patrick Healy
Action (Poland)	18-Nov-2019	Secondary Transaction - Private	\$929.86M _E		Profitable	Computers, Parts and Peripherals	
Nordic Fund Market	14-Nov-2019	Buyout/LBO [†]		3		Buildings and Property	Zita Saurel
Well (Other Healthcare Technology Systems)	14-Nov-2019	Early Stage VC (Series A1)	\$25.00M	3	Generating Revenue	Other Healthcare Technology Systems	
W.R. Carey Corporation	08-Nov-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Human Capital Services	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Stevens Dell and Associates	07-Nov-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Gibson Deland Insurance (Marine Book of Business)	06-Nov-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Marine	David Tunnell
Newsura Insurance Services (Associated Property and Casualty Lines)	05-Nov-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell
RBI Advisory Group	04-Nov-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
William Peragine III and John Biondo (brokerage services and investment advisory book of business)	17-Oct-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Brokerage	David Tunnell
Policy Works	15-Oct-2019	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Business/Productivity Software	David Tunnell
Fundinfo (Fund Research Business)	08-Oct-2019	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Media and Information Services (B2B)	Zita Saurel
PDF Financial	08-Oct-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
LBA Insurance Services	07-Oct-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Insurance	David Tunnell
ProCorp Financial	04-Oct-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Insurance	David Tunnell
Optimum Solutions (Nashville)	02-Oct-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	David Tunnell
Regency Advisory Corporation	02-Oct-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Human Capital Services	David Tunnell
InvestLab	09-Sep-2019	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Financial Software	Zita Saurel
Global Retirement Partners	04-Sep-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Financial Services	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
HUB Retirement and Wealth Management	04-Sep-2019	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Financial Services	David Tunnell
Phil Bailey & Associates	04-Sep-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
StoneStreet Advisor Group	04-Sep-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
TechMass	01-Sep-2019	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Business/Productivity Software	Blake Kleinman
Disability Book of Business	16-Aug-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Life and Health Insurance	David Tunnell
EPIC Retirement Services Consulting	15-Aug-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Financial Services	David Tunnell
Inter-Mountain Retirement Partners	15-Aug-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
Perennial Pension & Wealth	15-Aug-2019	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Other Financial Services	David Tunnell
WhartonHill Advisors	15-Aug-2019	Buyout/LBO (Add-on) [†]		7	Generating Revenue	Asset Management	David Tunnell
Kilbride & Harris Insurance Services	09-Aug-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Nationwide Insurance Company (Property and Casualty Books of Business)	07-Aug-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Cretcher Heartland	06-Aug-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Commercial Services	
Herb's Paint & Body	05-Aug-2019	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Automotive	Matt Eisen
Insurance Center of New England	05-Aug-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Przelewy24	02-Aug-2019	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Financial Software	Patrick Healy
Control4	01-Aug-2019	Buyout/LBO (Add-on) [†]	\$680.00M	1	Profitable	Electronics (B2C)	Erik Ragatz

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Custom Plus Distributing	19-Jul-2019	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Distributors/Wholesale	Erik Ragatz
Cosaint Insurance Partners	10-Jul-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
The Crichton Group	09-Jul-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Berk Bilgen Insurance	03-Jul-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
BenefitLink Resource Group	02-Jul-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
SkyLab Italia	18-Jun-2019	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Business/Productivity Software	Blake Kleinman
Foster & Parker Insurance	17-Jun-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
In-Fi	14-Jun-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	David Tunnell
Porchlight Financial	06-Jun-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Human Capital Services	David Tunnell
Cottenie and Gardner	04-Jun-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
^x Scout24	14-May-2019	Buyout/LBO	\$6.39B ^E	1	Profitable	Real Estate Services (B2C)	
RIMS Insurance Brokerage Corporation	08-May-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Clarity Benefits Group	07-May-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Kelliher Agencies	06-May-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Resource Insurance Services	03-May-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Specialized Finance	David Tunnell
First Western Insurance Agency	02-May-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Multi-line Insurance	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
TechCanary	10-Apr-2019	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Business/Productivity Software	David Tunnell
Price's Collision Centers	09-Apr-2019	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Automotive	Matt Eisen
Corey Steinbach Insurance Agency	05-Apr-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Insurance	David Tunnell
Premiere Risk Management	03-Apr-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Del Fisher Insurance	02-Apr-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
RiteHealth Solutions	19-Mar-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
MRI Premium Distribution Services	15-Mar-2019	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Distributors/Wholesale	Erik Ragatz
The Insurance Exchange (Insurance Brokers)	11-Mar-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Hub International (Entertainment Book of Business)	10-Mar-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Peak Financial Group (Texas)	07-Mar-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
M.B.I. Group	04-Mar-2019	Buyout/LBO (Add-on) [†]		6	Generating Revenue	Insurance Brokers	David Tunnell
Integrated Risk Solutions	14-Feb-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Legal Services (B2B)	David Tunnell
HUB Ontario	12-Feb-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
Hub International (Motorsports Book Of Business)	06-Feb-2019	Buyout/LBO [†]		4		Buildings and Property	David Tunnell
Fortenberry McNamara	01-Feb-2019	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Other Insurance	David Tunnell
Caliber Collision	24-Jan-2019	Buyout/LBO (Secondary) [†]		1	Profitable	Automotive	Matt Eisen

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Forum Risques et Assurance	09-Jan-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Sheridan Road Financial	09-Jan-2019	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Financial Services	David Tunnell
Concardis	07-Jan-2019	Buyout/LBO (Add-on) [†]		6	Profitable	Other Hardware	Patrick Healy
eCard	04-Jan-2019	Buyout/LBO (Secondary) [†]	\$83.13M	6	Profitable	Other Financial Services	Patrick Healy
Nagys Collision Centers(10 Locations)	01-Jan-2019	Buyout/LBO [†]		2	Generating Revenue	Buildings and Property	Matt Eisen
TRG Group Benefits	01-Jan-2019	Buyout/LBO (Add-on) [†]		4	Profitable	Consulting Services (B2B)	David Tunnell
Rise People (Employee Benefits Practice)	17-Dec-2018	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Consulting Services (B2B)	David Tunnell
Apex Insurance Brokers	14-Dec-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
G.P. Barich Insurance Agency	13-Dec-2018	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Property and Casualty Insurance	David Tunnell
Dadgar Insurance Agency	12-Dec-2018	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Nolen Associates	11-Dec-2018	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Volutone Distributing Co.	13-Nov-2018	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Distributors/Wholesale	Erik Ragatz
Kuokoa Enterprises	08-Nov-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Tri Line Agencies	07-Nov-2018	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Proteus Performance Management	05-Nov-2018	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Other Financial Services	David Tunnell
Insurance Management Associates (Annapolis)	02-Nov-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
The TAMRAC Group	01-Nov-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Jones Retirement Plan Advisors	16-Oct-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Asset Management	David Tunnell
Liberty New Gate	04-Oct-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Commercial/Professional Insurance	David Tunnell
The Rubin Group	19-Sep-2018	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Hometown Insurance Brokers	11-Sep-2018	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell
Clearwater Insurance	10-Sep-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
Hub International Ottawa	07-Sep-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Harman Real Estate	05-Sep-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Media and Information Services (B2B)	David Tunnell
Blackstone Insurance, Benefits & Bonding	08-Aug-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Benefit Broker Services	07-Aug-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Financial Services	David Tunnell
The Ward Agency	06-Aug-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
SimpliSafe	03-Aug-2018	Buyout/LBO			Profitable	Electronics (B2C)	
Cypher Systems (Insurance Brokerage Division)	02-Aug-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Edelman Financial Engines	14-Jul-2018	Buyout/LBO	\$3.02B		Profitable	Other Financial Services	
Independent Financial Concepts Group	10-Jul-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Optimum Group Benefits & Insurance Services	09-Jul-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Wm. W. Hammond Insurance Agency	09-Jul-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell
The Right Choice Insurance Agency	03-Jul-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Flather & Perkins	23-May-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Barnett Corporate Insurers	08-May-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell
dElta Benefits	07-May-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Easy Truck Insurance	04-May-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Automotive Insurance	David Tunnell
Carlton Insurance Brokers	03-May-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Kelly King Insurance Services	02-May-2018	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
BK-JET Group	24-Apr-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Norman-Spencer Agency (Marine and Crane Business)	12-Apr-2018	Merger/Acquisition		1	Generating Revenue	Commercial/Professional Insurance	
Saffe Property & Casualty (Houston Operations)	05-Apr-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell
The Benefits Company	03-Apr-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell
ES3 Advisory	01-Apr-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Consulting Services (B2B)	David Tunnell
Allnet Distributing	22-Mar-2018	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Distributors/Wholesale	Erik Ragatz
myON	19-Mar-2018	Buyout/LBO (Secondary) [†]		2	Generating Revenue	Educational Software	Anupam Mishra
Desilets Insurance Brokers	07-Mar-2018	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Leitao Insurance Agency	07-Mar-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
TYG Insurance	06-Mar-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Consulting Services (B2B)	David Tunnell
Spectra Management	05-Mar-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell
GMS Insurance	02-Mar-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Consulting Services (B2B)	David Tunnell
Altocloud	27-Feb-2018	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Business/Productivity Software	Tarim Wasim
Pointbreak Consulting Group	16-Feb-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Consulting Services (B2B)	David Tunnell
^x Nets	13-Feb-2018	Buyout/LBO (Secondary)	\$5.48B	6	Profitable	Financial Software	Patrick Healy
Kindersley Insurance	07-Feb-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
IPS Advisors	05-Feb-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell
Susoreny & Associates	02-Feb-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Automotive Insurance	David Tunnell
Der Manouel Insurance Group	01-Feb-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Finamatrix	17-Jan-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Financial Software	Zita Saurel
Daniel Picard	11-Jan-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Property and Casualty Insurance	David Tunnell
Cosmo Insurance Service	05-Jan-2018	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Property and Casualty Insurance	David Tunnell
Desert Empire Insurance Services	04-Dec-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Contractor's Services	01-Dec-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Financial Services	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Surety Services	01-Dec-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Financial Services	David Tunnell
Summit Financial Insurance Agency	27-Nov-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Financial Services	David Tunnell
Allfunds Bank	21-Nov-2017	Buyout/LBO	\$2.10B	2	Generating Revenue	Other Financial Services	Zita Saurel
Wells Fargo Insurance (Crop Insurance Broker Business)	09-Nov-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Axella Insurance Services	02-Nov-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Graffam Insurance Group	17-Oct-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Marwil & Associates	11-Oct-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Financial Services	David Tunnell
Kenneth A. Murray Insurance	09-Oct-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Banyan Consulting Group	06-Oct-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Consulting Services (B2B)	David Tunnell
Costello & Sons Insurance	05-Oct-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Baker and Associates (Alaska)	03-Oct-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
Rural Alaska Insurance Agency	02-Oct-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Benefit Advisory Group	18-Sep-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell
Delisle Agencies	13-Sep-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Banco Management (managing general agent business)	12-Sep-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Commercial Services	David Tunnell
Stellarus Benefits	11-Sep-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Executive Risk Management (Illinois)	05-Sep-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Integro (Canada)	01-Sep-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Coordinated Resources Group	09-Aug-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Consulting Services (B2B)	David Tunnell
Rogers, Gunter, Vaughn	08-Aug-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Bianchi & Associates	04-Aug-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Patrice Varin (Certain Assets)	04-Aug-2017	Buyout/LBO [†]		3		Buildings and Property	David Tunnell
*Snap One	04-Aug-2017	Buyout/LBO (Secondary)	\$658.50M _€		Generating Revenue	Other Commercial Services	Erik Ragatz
East West Insurance Services	03-Aug-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
vBrand	03-Aug-2017	Buyout/LBO (Add-on) [†]		7	Generating Revenue	Multimedia and Design Software	
Steve Mariani Insurance	02-Aug-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
MillsonJames	14-Jul-2017	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Human Capital Services	David Tunnell
Unilite Insurance Agency	11-Jul-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
Cassanova	01-Jul-2017	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Brady Insurance Planning	07-Jun-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Consulting Services (B2B)	David Tunnell
Colton Insurance Associates	06-Jun-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
EvolutionFit	01-Jun-2017	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Henry M. Murray Agency	01-Jun-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Multimedia IT	01-Jun-2017	Buyout/LBO (Add-on) [†]		2	Generating Revenue	IT Consulting and Outsourcing	Blake Kleinman
Software Time	31-May-2017	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
^x Pharmaceutical Product Development	08-May-2017	PE Growth/Expansion		3	Profitable	Laboratory Services (Healthcare)	Allen Thorpe
Scarborough Company Insurance	03-May-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
City Insurance Services	01-May-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Insurance Supermarket (certain assets)	07-Apr-2017	Buyout/LBO [†]		3		Buildings and Property	David Tunnell
Heritage Corporate Benefits	03-Apr-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
NetLex (Rome)	01-Apr-2017	Buyout/LBO (Add-on) [†]		3	Profitable	Business/Productivity Software	Blake Kleinman
BCI Group	17-Mar-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Commercial Services	David Tunnell
Cassco Insurance	06-Mar-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Tri-Star Insurance Professionals	03-Mar-2017	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
LISSC	02-Mar-2017	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Multi-line Insurance	David Tunnell
Leavitt Insurance Services of Southern California	02-Mar-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Silver Lining Solutions	27-Feb-2017	Buyout/LBO (Add-on) [†]		5	Profitable	Business/Productivity Software	Tarim Wasim
Employers Resource Group Financial & Insurance Services	21-Feb-2017	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Multi-line Insurance	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Financial Management Solutions	05-Jan-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Systems and Information Management	David Tunnell
Mainline Insurance Brokers	04-Jan-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Elkins Jones Insurance Agency	01-Jan-2017	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Vulcan Solutions (insurtech division)	01-Jan-2017	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	David Tunnell
Tevis Insurance Solutions	30-Dec-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Medley/Turrentine & Associates	06-Dec-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Property and Casualty Insurance	David Tunnell
Pinnacle Financial Group	02-Dec-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
AliasLab	01-Dec-2016	Buyout/LBO (Add-on) [†]		3	Profitable	Network Management Software	Blake Kleinman
Interactive Intelligence Group	01-Dec-2016	Buyout/LBO (Add-on) [†]	\$1.40B	5	Generating Revenue	IT Consulting and Outsourcing	Tarim Wasim
MDW Insurance	01-Dec-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
TS C&D	01-Dec-2016	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
DFM Insurance Agency	09-Nov-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
Jamie Campbell Younger (Insurance Book of Business)	03-Nov-2016	Buyout/LBO [†]		3		Buildings and Property	David Tunnell
Riviera Insurance Services	01-Nov-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Datamatics Management Services	25-Oct-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Commercial Services	David Tunnell
Mayport Insurance & Realty	05-Oct-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Sweet & Baker Insurance Brokers	04-Oct-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Falck Alarm	03-Oct-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Security Services (B2B)	
Norton Insurance Agency	01-Oct-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
IS2 (eTrading Platform)	29-Sep-2016	Buyout/LBO [†]		2		Financial Software	David Tunnell
Sarjeant Insurance Brokers	08-Sep-2016	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Patterson Insurance Brokers	07-Sep-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
New Dimensions Underwriters	06-Sep-2016	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Financial Services	David Tunnell
Hickey & Associates (Certain Assets)	02-Sep-2016	Buyout/LBO [†]		3		Buildings and Property	David Tunnell
Alkè (Information Technology Division)	01-Sep-2016	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Informatica Veneta	01-Sep-2016	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Blake Kleinman
Evidera	16-Aug-2016	Buyout/LBO (Secondary) [†]		2	Generating Revenue	Consulting Services (B2B)	Allen Thorpe
Relay Software	29-Jul-2016	Buyout/LBO (Secondary) [†]		2	Generating Revenue	Business/Productivity Software	David Tunnell
KeenanSuggs Insurance	26-Jul-2016	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Genesys	21-Jul-2016	Secondary Transaction - Private	\$900.00M	1	Generating Revenue	Business/Productivity Software	Tarim Wasim
Parq Advisors	18-Jul-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Life and Health Insurance	David Tunnell
Four Sons Auto Glass	08-Jul-2016	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Ochre Media	08-Jul-2016	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Media and Information Services (B2B)	Erik Ragatz
HSBI Benefits	06-Jul-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Gateway Benefits	05-Jul-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Financial Services	David Tunnell
e-economic	17-Jun-2016	Buyout/LBO (Secondary) [†]		2	Generating Revenue	Financial Software	Blake Kleinman
FirstBank Insurance Agency (certain assets)	03-Jun-2016	Buyout/LBO [†]		3		Buildings and Property	David Tunnell
1st Alaska Insurance	02-Jun-2016	Buyout/LBO (Add-on) [†]		3	Startup	Insurance Brokers	David Tunnell
*Claritev	01-Jun-2016	Buyout/LBO (Secondary)	\$7.50B	7	Generating Revenue/Not Profitable	Practice Management (Healthcare)	Allen Thorpe
Mondora	01-Jun-2016	Buyout/LBO (Add-on) [†]	\$1.01M	2	Profitable	Systems and Information Management	Blake Kleinman
First Santa Fe Insurance Services	03-May-2016	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Multi-line Insurance	David Tunnell
Gonzalez & Goenaga	12-Apr-2016	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Property and Casualty Insurance	David Tunnell
Harmony Insurance	05-Apr-2016	Buyout/LBO (Secondary) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
Harmony Insurance (Commercial Lines Insurance)	05-Apr-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Pickett & Associates Insurance Agency	04-Apr-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
BenefitsMart	08-Mar-2016	Buyout/LBO (Add-on) [†]		1	Profitable	Human Capital Services	David Tunnell
Greene Hazel Insurance Group	02-Mar-2016	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Equity Risk Partners	03-Feb-2016	Buyout/LBO (Secondary) [†]		1	Profitable	Multi-line Insurance	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Columbian Agency	02-Feb-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
RPG Solutions	18-Jan-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Consulting Services (B2B)	David Tunnell
Empower Software Solutions	14-Jan-2016	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Application Software	David Tunnell
Cowan Benefit Services	05-Jan-2016	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Services (B2C Non-Financial)	David Tunnell
Mondoesa Laghi	31-Dec-2015	Buyout/LBO (Add-on) [†]	\$0.11M	2	Generating Revenue	Financial Software	Blake Kleinman
Ulisse Tecnologie	31-Dec-2015	Buyout/LBO (Add-on) [†]	\$2.06M	2	Generating Revenue	Financial Software	Blake Kleinman
Nexi	18-Dec-2015	Buyout/LBO	\$2.37B	5	Profitable	Financial Software	
TeamSystem	07-Dec-2015	Buyout/LBO (Secondary)	\$1.29B		Profitable	Business/Productivity Software	Blake Kleinman
^x LPL Financial Holdings	19-Nov-2015	Share Repurchase	\$1.76B		Profitable	Brokerage	
Employee Benefits Group	05-Nov-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
RFO Enterprises	04-Nov-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell
Collisionmax Auto Body	30-Oct-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Segur Control	27-Oct-2015	Buyout/LBO (Add-on) [†]	\$22.83M	1	Generating Revenue	Other Commercial Products	Patrick Healy
Pro Automotive Collision	23-Oct-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Edelman Financial Engines	12-Oct-2015	Buyout/LBO (Secondary)	\$800.00M	1	Profitable	Other Financial Services	Allen Thorpe
Oxford Coverage	12-Oct-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Verisure	06-Oct-2015	Buyout/LBO (Secondary)	\$5.28B	1	Profitable	Other Services (B2C Non-Financial)	Patrick Healy
Johnson & Wood Insurance Services	05-Oct-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
IAS Associates	02-Oct-2015	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Insurance Brokers	David Tunnell
Express Auto Glass	21-Sep-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Kaba Workforce Solutions (AutoTime Business)	18-Sep-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Office Services (B2B)	David Tunnell
MadBit Entertainment	15-Sep-2015	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Financial Software	Blake Kleinman
Classmarkets	08-Sep-2015	Buyout/LBO (Add-on) [†]	\$4.64M	2	Profitable	Business/Productivity Software	Patrick Healy
Howitt Benefit Services	08-Sep-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Human Capital Services	David Tunnell
Brown Agency	04-Sep-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Commercial/Professional Insurance	David Tunnell
EmSpring	03-Sep-2015	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Other Services (B2C Non-Financial)	David Tunnell
Arrow Insurance Service	02-Sep-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Commercial/Professional Insurance	David Tunnell
EvoSure	01-Sep-2015	Buyout/LBO (Add-on) [†]		2	Generating Revenue	IT Consulting and Outsourcing	David Tunnell
Lehman's Garage	28-Aug-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Doctors Insurance Services of New England	17-Aug-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Insurance	David Tunnell
Altegra Health	13-Aug-2015	Buyout/LBO (Secondary) [†]	\$910.00M	2	Generating Revenue	Enterprise Systems (Healthcare)	Allen Thorpe
Dunagan Associates (Employee Benefits Book-of-Business)	07-Aug-2015	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Human Capital Services	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Colorado Nonprofit Insurance Agency	06-Aug-2015	Buyout/LBO (Add-on) [†]		3	Profitable	Multi-line Insurance	David Tunnell
Pippel Insurance Agency	05-Aug-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
BW Insurance Agency	04-Aug-2015	Buyout/LBO (Add-on) [†]		3	Profitable	Multi-line Insurance	David Tunnell
Henry Bros Auto Body & Paint Shop	31-Jul-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Commercial Services	Erik Ragatz
UnityWorks	27-Jul-2015	Buyout/LBO (Add-on) [†]		12	Generating Revenue	Media and Information Services (B2B)	Brian Powers JD
Prestige Collision Specialists	24-Jul-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Group Benefit Specialists	13-Jul-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Services (B2C Non-Financial)	David Tunnell
Kadels Auto Body	10-Jul-2015	Buyout/LBO (Secondary) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Cooper, Simms, Nelson & Mosley	06-Jul-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
The HDH Group	02-Jul-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Reflections Auto Body (Milwaukee Branch)	30-Jun-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Commercial Services	Erik Ragatz
Semcat	16-Jun-2015	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Systems and Information Management	David Tunnell
Lovsted-Worthington Insurance	03-Jun-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Multi-line Insurance	David Tunnell
Gamble Insurance	02-Jun-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Multi-line Insurance	David Tunnell
Shofner Lynch & Shulse	01-Jun-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Framberger Employee Benefits & Insurance Services	12-May-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Indy Collision Center	04-May-2015	Buyout/LBO [†]		1	Profitable	Buildings and Property	Erik Ragatz
Keenan Auto Body	01-May-2015	Buyout/LBO (Add-on) [†]	\$20.00M	1	Profitable	Automotive	Erik Ragatz
Quality Werks Collision Center	17-Apr-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Services (B2C Non-Financial)	Erik Ragatz
Helix Education	13-Apr-2015	Buyout/LBO (Add-on) [†]		3	Profitable	Media and Information Services (B2B)	Anupam Mishra
Acacia Park Auto Body	10-Apr-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Commercial Services	Erik Ragatz
Zaks Hi Tech Collision Center	10-Apr-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Road	Erik Ragatz
N Compass Group	08-Apr-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
The Flood Group	07-Apr-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Multi-line Insurance	David Tunnell
Progressive Home Warranty Solutions	31-Mar-2015	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Insurance Brokers	David Tunnell
Interstate Glass (4 Repair Centers)	13-Mar-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Commercial Services	Erik Ragatz
Laubacher Insurance Agency	05-Mar-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Life and Health Insurance	David Tunnell
Crash1 Off Alpine	27-Feb-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Commercial Services	Erik Ragatz
Clinical Research Advantage Holdings	24-Feb-2015	Buyout/LBO (Secondary) [†]		2	Generating Revenue	Other Pharmaceuticals and Biotechnology	Allen Thorpe
Triangle Auto Body	20-Feb-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Commercial Services	Erik Ragatz
UClass	19-Feb-2015	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Educational Software	Anupam Mishra
Barrett's Collision Centre	06-Feb-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Road	Erik Ragatz

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
GW Auto Rebuild	06-Feb-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Alexander Insurance Agency	04-Feb-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Multi-line Insurance	David Tunnell
Fidelity Associates	08-Jan-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
NxTech	07-Jan-2015	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Financial Software	David Tunnell
Gathings Insurance Services	06-Jan-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Smith Watson Parker Insurance	05-Jan-2015	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
MMZ Associates	02-Jan-2015	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Automotive Insurance	David Tunnell
*X-Chem	01-Jan-2015	Buyout/LBO		1	Generating Revenue	Biotechnology	
Ruhl & Ruhl Insurance	23-Dec-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Collision Automotive Repair Specialists	15-Dec-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Consolidated Collision Center	15-Dec-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Road	Erik Ragatz
Murdock Chevrolet	15-Dec-2014	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Specialty Retail	Erik Ragatz
AdminiSource Communications	10-Dec-2014	Buyout/LBO (Add-on) [†]	\$35.00M	4	Generating Revenue	Enterprise Systems (Healthcare)	Allen Thorpe
John O. Bronson	02-Dec-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Multi-line Insurance	David Tunnell
Livermore & Associates Insurance Services	01-Dec-2014	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Change Healthcare (Acquired 2014)	19-Nov-2014	Buyout/LBO (Add-on) [†]	\$185.00M	2	Generating Revenue	Other Healthcare Technology Systems	Allen Thorpe

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Fotek Insurance Agency	05-Nov-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Laurus Strategies	04-Nov-2014	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Human Capital Services	David Tunnell
Affinnova	29-Oct-2014	Buyout/LBO (Add-on) [†]		7	Generating Revenue	Media and Information Services (B2B)	Patrick Healy
Alliance Assurance (Auto Dealer Business)	20-Oct-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive Insurance	David Tunnell
CORPO Collision Center	13-Oct-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
FieldEddy	07-Oct-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
^x Grocery Outlet Holding	07-Oct-2014	Buyout/LBO (MBO)	\$1.10B		Profitable	Department Stores	Erik Ragatz
Auto Werks of Northbrook	03-Oct-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Hub International Florida	02-Oct-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Consolidated Auto Service Center	19-Sep-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Commercial Services	Erik Ragatz
USA Collision Centers (Four Centers)	05-Sep-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
^x ABRA Auto Body & Glass	28-Aug-2014	Buyout/LBO (MBO)	\$750.00M		Generating Revenue	Automotive	Erik Ragatz
Deals Glass Services	22-Aug-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Commercial Services	Erik Ragatz
Kimble Glass Services	22-Aug-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Other Commercial Services	Erik Ragatz
Tennessee Collision Repair	15-Aug-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Automotive	Erik Ragatz
Ballard Insurance Agency	04-Aug-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Autohound Collision	25-Jul-2014	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Automotive	Erik Ragatz
Gibson's Insurance Agency	07-Jul-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Free Market Insurance Agency	02-Jul-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Fox-Everett	01-Jun-2014	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Commercial/Professional Insurance	David Tunnell
Immobilien	28-May-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Real Estate Services (B2C)	Patrick Healy
Patroll International	22-Apr-2014	Buyout/LBO (Add-on) [†]	\$3.50M ^E	5	Generating Revenue	Security Services (B2B)	
^x Renaissance Learning	11-Apr-2014	Buyout/LBO (Secondary)	\$1.10B	1	Generating Revenue	Educational Software	Anupam Mishra
Essex Insurance & Travel	07-Apr-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Cusson & Anderson Financial Services	02-Apr-2014	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Insurance Brokers	David Tunnell
Corporate Benefits Advisors	05-Mar-2014	Buyout/LBO (Add-on) [†]		1	Profitable	Consulting Services (B2B)	
First National Administrators	04-Mar-2014	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Life and Health Insurance	David Tunnell
Baldrice & Company	04-Feb-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Property and Casualty Insurance	David Tunnell
The Tammariello Group	04-Feb-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Property and Casualty Insurance	David Tunnell
^x Scout24	01-Feb-2014	Buyout/LBO	\$2.72B	3	Profitable	Real Estate Services (B2C)	Patrick Healy
Applied Systems	24-Jan-2014	Buyout/LBO (Secondary)	\$1.80B	1	Generating Revenue	Business/Productivity Software	David Tunnell
CampusIT	20-Jan-2014	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Educational Software	Anupam Mishra

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
GNW-Evergreen Insurance Services	06-Jan-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
iMatrix	06-Jan-2014	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Media and Information Services (B2B)	Brian Powers JD
Pinnacle Insurance Partners (Insurance Agency Business)	03-Jan-2014	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Seeger Benefits & Insurance Services	03-Jan-2014	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Multi-line Insurance	David Tunnell
GCM Grosvenor Private Markets	02-Jan-2014	Buyout/LBO (Add-on) [†]	\$200.00M _E	1	Generating Revenue	Asset Management	Allen Thorpe
International Special Risks	26-Nov-2013	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
Pallister Insurance Brokers	04-Nov-2013	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
^x Catalina Marketing (Saint Petersburg)	11-Oct-2013	PE Growth/Expansion		1	Bankruptcy: Admin/Reorg	Media and Information Services (B2B)	Edward Woiteshek
Local Offer Network	10-Oct-2013	Buyout/LBO		1	Generating Revenue	Business/Productivity Software	
Hub International	02-Oct-2013	Buyout/LBO (Secondary)	\$4.40B	3	Profitable	Insurance Brokers	David Tunnell
Liberty Anesthesia	01-Sep-2013	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Hospitals/ Inpatient Services	Allen Thorpe
HostelBookers.com	27-Aug-2013	Buyout/LBO (Add-on) [†]	\$102.58M	1	Generating Revenue	Application Software	Stephen Duckett
Time Link International	20-Aug-2013	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Business/Productivity Software	David Tunnell
^x CARFAX Canada	19-Aug-2013	PE Growth/Expansion			Generating Revenue	Automotive	Patrick Healy
Accelerated Enrollment Solutions	07-Aug-2013	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	Allen Thorpe
Phroot	01-Jul-2013	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Financial Software	Stephen Duckett

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Sites-Canada	01-May-2013	Buyout/LBO (Add-on) [†]		2	Profitable	Media and Information Services (B2B)	Brian Powers JD
HFH Collision	12-Apr-2013	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Other Commercial Services	Erik Ragatz
Collision Plus Auto Body Repair Centers	28-Dec-2012	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Automotive	Erik Ragatz
Raintree Insurance Agency	06-Nov-2012	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Multi-line Insurance	David Tunnell
Fort Point Insurance Services	01-Nov-2012	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Multi-line Insurance	David Tunnell
Accu Med Technology Solutions	08-Oct-2012	Buyout/LBO (Add-on) [†]		4	Generating Revenue	Enterprise Systems (Healthcare)	Sameer Narang
Carrion Laffitte & Casellas	01-Oct-2012	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Insurance Brokers	David Tunnell
CubeLogic	21-Aug-2012	Buyout/LBO (Add-on) [†]		1	Profitable	Other Commercial Services	David Tunnell
^x Wood Mackenzie	03-Jul-2012	Buyout/LBO (Secondary)	\$1.17B		Profitable	Consulting Services (B2B)	Patrick Healy
SatisFacts Research	28-Jun-2012	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Media and Information Services (B2B)	Brian Powers JD
MGIS Property & Casualty Insurance Services (Western Business Unit)	19-Jun-2012	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Commercial/Professional Insurance	David Tunnell
TC3 Health	07-May-2012	Buyout/LBO (Secondary) [†]	\$61.00M	2	Profitable	Managed Care	Allen Thorpe
Modiv Media	30-Apr-2012	Buyout/LBO (Add-on) [†]		1	Profitable	Business/Productivity Software	Edward Woiteshek
Smart Computer Holdings	17-Apr-2012	Buyout/LBO (Add-on) [†]		2	Profitable	Human Capital Services	David Tunnell
F150 Forums	02-Apr-2012	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Social Content	Brian Powers JD
Signature Insurance Group	02-Apr-2012	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Insurance Brokers	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
^x Catalina Marketing (Saint Petersburg)	31-Mar-2012	Debt - General	\$8.70M		Bankruptcy: Admin/Reorg	Media and Information Services (B2B)	
Kronos SaaS	28-Mar-2012	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Human Capital Services	David Tunnell
WebApps	28-Mar-2012	Buyout/LBO (Add-on) [†]		2	Profitable	Automation/ Workflow Software	David Tunnell
Forum Runner	07-Mar-2012	Buyout/LBO (Add-on) [†]		2	Startup	Application Software	Brian Powers JD
SunGard Higher Education Managed Services	23-Jan-2012	Buyout/LBO (Secondary) [†]	\$1.78B	1	Profitable	Systems and Information Management	Anupam Mishra
Frugal Travel Guy	20-Jan-2012	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Media and Information Services (B2B)	Brian Powers JD
OptiLink	20-Jan-2012	Buyout/LBO (Secondary) [†]		2	Generating Revenue	Other Healthcare Services	David Tunnell
^x Ellucian	11-Jan-2012	Buyout/LBO	\$1.78B		Profitable	Business/Productivity Software	
Patron Insurance Services	05-Jan-2012	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Insurance Brokers	David Tunnell
Medisiss	01-Jan-2012	Buyout/LBO (Add-on) [†]		5	Generating Revenue	Surgical Devices	Allen Thorpe
^x Pharmaceutical Product Development	05-Dec-2011	Buyout/LBO	\$3.90B	1	Profitable	Laboratory Services (Healthcare)	Allen Thorpe
SolArc	30-Nov-2011	Buyout/LBO (Add-on) [†]		1	Profitable	Application Software	David Tunnell
gtr.co.uk	27-Oct-2011	Buyout/LBO [†]		2		Buildings and Property	Brian Powers JD
5series.net	25-Oct-2011	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Information Services (B2C)	Brian Powers JD
DieselBombers.com	25-Oct-2011	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Other Commercial Services	Brian Powers JD
^x Openlink Financial	12-Sep-2011	Buyout/LBO (Secondary)	\$1.03B	1	Generating Revenue	Financial Software	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Inhabitat	07-Sep-2011	Buyout/LBO (Add-on) [†]		2	Profitable	Publishing	Brian Powers JD
Verisure	01-Sep-2011	Buyout/LBO (MBO)	\$3.42B	4	Profitable	Other Services (B2C Non-Financial)	Stefan Goetz
Mercatus LLC	02-Aug-2011	Buyout/LBO (Add-on) [†]		1	Profitable	Consulting Services (B2B)	Philip Hammarskjold
JustMommies.com	11-Jul-2011	Buyout/LBO (Add-on) [†]		2	Profitable	Social/Platform Software	Brian Powers JD
Weddingbee.com	11-Jul-2011	Buyout/LBO (Add-on) [†]		2	Profitable	Vertical Market Software	Brian Powers JD
Nationwide (Productivity Solutions Business)	30-Jun-2011	Buyout/LBO (Add-on) [†]		2	Profitable	Other Commercial Services	David Tunnell
Galaher Settlements	31-May-2011	Buyout/LBO (Add-on) [†]	\$22.70M	2	Generating Revenue	Other Commercial Services	David Tunnell
Inside Network	12-May-2011	Buyout/LBO (Add-on) [†]	\$14.00M	1	Profitable	Information Services (B2C)	C. Andrew Ballard
Selective Settlements International	12-May-2011	Buyout/LBO (Add-on) [†]		2	Profitable	BPO/Outsource Services	David Tunnell
EquiClaim	03-May-2011	Buyout/LBO (Add-on) [†]	\$41.00M	3	Profitable	Other Healthcare Services	Allen Thorpe
Photolibrary	03-May-2011	Buyout/LBO (Add-on) [†]		2	Profitable	Publishing	C. Andrew Ballard
Nolo	02-May-2011	Buyout/LBO (Add-on) [†]		2	Profitable	Information Services (B2C)	Brian Powers JD
Principal Decision Systems International	02-May-2011	Buyout/LBO (Add-on) [†]		2	Profitable	Vertical Market Software	David Tunnell
Accounting Jobs Today	28-Apr-2011	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Human Capital Services	Brian Powers JD
Vertical Alliance Group (Website Assets)	28-Apr-2011	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Education and Training Services (B2B)	Brian Powers JD
PicScout	27-Apr-2011	Buyout/LBO (Add-on) [†]	\$20.00M	2	Profitable	Other Commercial Services	C. Andrew Ballard

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Specialty Risk Services	31-Mar-2011	Buyout/LBO (Add-on) [†]	\$278.00M	2	Profitable	Other Insurance	David Tunnell
National Retirement Partners	09-Feb-2011	Buyout/LBO (Add-on) [†]	\$25.30M	4	Profitable	Asset Management	
Promotional Codes	01-Jan-2011	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Internet Retail	Brian Powers JD
^x Internet Brands	17-Dec-2010	Buyout/LBO	\$640.00M	1	Profitable	Media and Information Services (B2B)	Brian Powers JD
Factual Photo	01-Nov-2010	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Consulting Services (B2B)	David Tunnell
^x Associated Materials	13-Oct-2010	Buyout/LBO (Secondary)	\$1.30B		Generating Revenue	Building Products	Erik Ragatz
^x Sedgwick Claims Management Services	29-May-2010	Buyout/LBO (Secondary)	\$1.10B	1	Profitable	Other Insurance	David Tunnell
GlanceGuide	04-May-2010	Buyout/LBO (Add-on) [†]		7	Profitable	Media and Information Services (B2B)	Patrick Healy
Collabrys	16-Apr-2010	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Media and Information Services (B2B)	Edward Woiteshek
Media Instruments	26-Mar-2010	Buyout/LBO (Add-on) [†]		7	Profitable	Business/Productivity Software	Patrick Healy
Healthcare Technology Management Services	24-Mar-2010	Buyout/LBO (Add-on) [†]	\$25.00M	2	Profitable	Other Communications and Networking	Allen Thorpe
USP Market Intelligence	08-Feb-2010	Buyout/LBO (Add-on) [†]		7	Profitable	Consulting Services (B2B)	Patrick Healy
DBC Smart Software	19-Jan-2010	Buyout/LBO (Add-on) [†]		1	Profitable	Automation/ Workflow Software	David Tunnell
COADE	06-Jan-2010	Buyout/LBO (Add-on) [†]		3	Profitable	Application Software	David Tunnell
@Futures	01-Jan-2010	Buyout/LBO (Add-on) [†]		10	Generating Revenue	Media and Information Services (B2B)	Patrick Healy
^x Ellucian	10-Dec-2009	Buyout/LBO (Secondary)	\$570.00M	2	Profitable	Business/Productivity Software	Anupam Mishra

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
*Hostelworld Group	12-Nov-2009	Buyout/LBO (Secondary)			Profitable	Other Restaurants, Hotels and Leisure	Stephen Duckett
Technische Comp Systeme Süssen (Elec Eng Software Business)	05-Nov-2009	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Business/Productivity Software	David Tunnell
Stromberg	14-Oct-2009	Buyout/LBO (Add-on) [†]	\$13.60M	2	Profitable	Application Software	David Tunnell
KoreanClick	09-Sep-2009	Buyout/LBO (Add-on) [†]		7	Profitable	Media and Information Services (B2B)	Patrick Healy
eRx Network	01-Jul-2009	Buyout/LBO (Add-on) [†]	\$75.00M	2	Generating Revenue	Enterprise Systems (Healthcare)	Allen Thorpe
GfK (Swiss Consumer Goods Unit)	26-Jun-2009	Buyout/LBO (Add-on) [†]		10	Generating Revenue	Media and Information Services (B2B)	Patrick Healy
The Sentinel Group	05-Jun-2009	Buyout/LBO (Add-on) [†]		2	Profitable	Other Healthcare Services	Allen Thorpe
The Cambridge Group	18-Mar-2009	Buyout/LBO (Add-on) [†]	\$61.20M	10	Profitable	Consulting Services (B2B)	Patrick Healy
ATW Information Technology Systems	01-Jan-2009	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Distributors/Wholesale	Stephen Duckett
Claritas	01-Jan-2009	Buyout/LBO (Add-on) [†]		10	Generating Revenue	Media and Information Services (B2B)	Patrick Healy
PROJECTminder	01-Jan-2009	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Business/Productivity Software	Stephen Duckett
*Sharebridge Private Equity Consolidated	17-Dec-2008	PE Growth/Expansion		6	Generating Revenue	Other Insurance	
GE Healthcare Information Technology (patient statement business)	29-Sep-2008	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Other Commercial Services	Allen Thorpe
*SSP (United Kingdom)	24-Sep-2008	Buyout/LBO	\$356.50M		Generating Revenue	Business/Productivity Software	Blake Kleinman
5 Star Computer Systems	18-Aug-2008	Buyout/LBO (Add-on) [†]		1	Generating Revenue	Application Software	Stephen Duckett

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
^x Getty Images Holdings	02-Jul-2008	Buyout/LBO (Secondary)	\$2.13B	1	Profitable	Media and Information Services (B2B)	C. Andrew Ballard
Sircon	01-Jul-2008	Buyout/LBO (Secondary) [†]		2	Generating Revenue	Financial Software	C. Andrew Ballard
^x AlterG	23-Jun-2008	Early Stage VC (Series A1)	\$2.33M	3	Generating Revenue	Therapeutic Devices	
Nielsen IAG	16-May-2008	Buyout/LBO (Secondary) [†]	\$223.00M	7	Profitable	Media and Information Services (B2B)	Patrick Healy
TechServer	06-May-2008	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Business/Productivity Software	David Tunnell
Drummohr Technology	01-May-2008	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Financial Software	Stephen Duckett
^x Gaztransport & Technigaz	06-Mar-2008	Secondary Transaction - Private	\$459.87M	2	Profitable	Other Containers and Packaging	Luca Velussi
^x Daikin Comfort Technologies North America	13-Feb-2008	Buyout/LBO (Secondary)	\$1.81B	2	Profitable	Household Appliances	Erik Ragatz
^x Change Healthcare	11-Feb-2008	Secondary Transaction - Private	\$575.00M	2	Profitable	Enterprise Systems (Healthcare)	Allen Thorpe
^x Adchemy	01-Jan-2008	Later Stage VC (Series C)	\$19.00M	2	Generating Revenue	Business/Productivity Software	
^x The Nielsen Company	17-Dec-2007	PE Growth/Expansion	\$10.00B	5	Profitable	Media and Information Services (B2B)	
Deploy Solutions	31-Oct-2007	Buyout/LBO (Add-on) [†]		2	Profitable	Application Software	David Tunnell
^x GCM Grosvenor	29-Oct-2007	Secondary Transaction - Private			Profitable	Asset Management	Allen Thorpe
Computers by Design	03-Oct-2007	Buyout/LBO (Add-on) [†]		1	Profitable	Automation/ Workflow Software	C. Andrew Ballard
^x Catalina Marketing (Saint Petersburg)	01-Oct-2007	Buyout/LBO	\$1.70B		Bankruptcy: Admin/Reorg	Media and Information Services (B2B)	Edward Woiteshek

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Independent Financial Marketing Group	05-Sep-2007	Buyout/LBO (Add-on) [†]	\$25.69M	4	Generating Revenue	Insurance Brokers	
Eclipse (IT Consulting and Outsourcing)	17-Aug-2007	Buyout/LBO (Add-on) [†]	\$100.50M	3	Generating Revenue	IT Consulting and Outsourcing	David Tunnell
Telephia	10-Aug-2007	Buyout/LBO (Add-on) [†]	\$440.00M	6	Profitable	Media and Information Services (B2B)	Patrick Healy
*Embanet	02-Aug-2007	Later Stage VC		6	Generating Revenue	Education and Training Services (B2B)	
eTapestry.com	01-Aug-2007	Buyout/LBO (Add-on) [†]	\$25.42M	2	Generating Revenue	Financial Software	
LPL Independent Advisor Services Group	20-Jun-2007	Buyout/LBO (Add-on) [†]	\$120.48M	6	Profitable	Other Financial Services	
Captor Group	13-Jun-2007	Buyout/LBO (Secondary) [†]		3	Profitable	Application Software	David Tunnell
UKG	13-Jun-2007	Buyout/LBO	\$1.80B ^E	3	Profitable	Business/Productivity Software	David Tunnell
*Aplifi	11-Jun-2007	PE Growth/Expansion		2	Generating Revenue	Financial Software	
*IRIS Software Group	11-Jun-2007	Buyout/LBO (Secondary)			Profitable	Financial Software	Stephen Duckett
*Surge Medicine	10-Jun-2007	Early Stage VC (Series B)	\$8.50M	2	Bankruptcy: Liquidation	Clinics/Outpatient Services	
Activant Silk Systems	31-May-2007	Buyout/LBO (Add-on) [†]	\$6.31M	3	Generating Revenue	Business/Productivity Software	David Tunnell
*Sheridan Healthcare	21-May-2007	Buyout/LBO (Secondary)	\$925.00M	1	Profitable	Human Capital Services	Allen Thorpe
*Gartmore Group	27-Apr-2007	Share Repurchase	\$535.41M		Profitable	Asset Management	
ImageRight	12-Apr-2007	Buyout/LBO (Add-on) [†]		1	Profitable	Automation/ Workflow Software	C. Andrew Ballard
GISquadrat (Software Operations)	10-Apr-2007	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	David Tunnell

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Tangozebra	01-Mar-2007	Buyout/LBO (Add-on) [†]	\$29.37M	6	Profitable	Media and Information Services (B2B)	Philip Hammarskjold
^x PARIS RE Holdings	02-Jan-2007	Buyout/LBO	\$158.00M	11	Generating Revenue	Re-Insurance	
UVEST Financial Services	02-Jan-2007	Buyout/LBO (Add-on) [†]	\$89.45M	2	Profitable	Specialized Finance	
^x Nexant	01-Jan-2007	Later Stage VC		3	Generating Revenue	Business/Productivity Software	
^x PartnerRe	21-Dec-2006	Buyout/LBO		1	Profitable	Re-Insurance	
^x Intergraph	29-Nov-2006	Buyout/LBO	\$1.30B ^E	3	Generating Revenue	IT Consulting and Outsourcing	David Tunnell
^x AlixPartners	04-Aug-2006	Buyout/LBO (MBO)	\$681.00M		Profitable	Consulting Services (B2B)	Philip Hammarskjold
Radio & Records	01-Aug-2006	Buyout/LBO (Add-on) [†]		8	Out of Business	Publishing	Patrick Healy
BCF Technology (Software Solutions)	12-Jul-2006	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Financial Software	C. Andrew Ballard
DoubleClick Rich Media and Video	28-Jun-2006	Buyout/LBO (Add-on) [†]		2	Profitable	Internet Software	C. Andrew Ballard
^x Gartmore Group	26-May-2006	Buyout/LBO	\$932.21M	1	Profitable	Asset Management	Patrick Healy
^x Artisan Partners Asset Management	04-May-2006	PE Growth/Expansion	\$500.00M ^E		Profitable	Asset Management	Brian Powers JD
^x Activant Solutions	03-May-2006	Buyout/LBO (Secondary)	\$785.00M	2	Profitable	Vertical Market Software	David Tunnell
Falk eSolutions	23-Mar-2006	Buyout/LBO (Add-on) [†]		1	Profitable	Automation/ Workflow Software	Philip Hammarskjold
FinancePro	16-Mar-2006	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Financial Software	C. Andrew Ballard
^x LPL Financial Holdings	28-Dec-2005	Buyout/LBO	\$1.50B	5	Profitable	Brokerage	
^x GeoVera Holdings	02-Nov-2005	Buyout/LBO		1	Profitable	Property and Casualty Insurance	

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
Mitchell ClaimIQ	13-Sep-2005	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Automation/ Workflow Software	Marco Hellman
^x DoubleClick	13-Jul-2005	Buyout/LBO	\$1.07B	1	Generating Revenue	Business/Productivity Software	Philip Hammarskjold
InStar	21-Jun-2005	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	C. Andrew Ballard
^x Texas Genco	13-Apr-2005	Buyout/LBO	\$3.65B	4	Profitable	Electric Utilities	
Custom Insurance Solutions	03-Feb-2005	Buyout/LBO (Add-on) [†]		2	Generating Revenue	Business/Productivity Software	C. Andrew Ballard
^x Vertafore	22-Dec-2004	Buyout/LBO (Secondary)	\$400.00M	1	Profitable	Financial Software	C. Andrew Ballard
^x Mondrian Investment Partners	27-Sep-2004	Buyout/LBO (MBO)	\$172.00M		Profitable	Asset Management	Allen Thorpe
^x Upromise	23-Mar-2004	Later Stage VC (Series D)	\$17.00M _E	1	Generating Revenue	Application Software	Philip Hammarskjold
^x Axel Springer	04-Nov-2003	Secondary Transaction - Open Market	\$411.57M		Profitable	Publishing	
ProSiebenSat.1 Media	11-Aug-2003	Buyout/LBO	\$595.31M	5	Profitable	Movies, Music and Entertainment	
^x Upromise	09-Oct-2002	Later Stage VC (Series C)	\$12.00M	2	Generating Revenue	Application Software	Philip Hammarskjold
^x Arch Capital Group	20-Nov-2001	Buyout/LBO	\$763.20M	2	Profitable	Commercial/Professional Insurance	John Bunce Jr.
^x Nasdaq	12-Nov-2001	PE Growth/Expansion	\$5.13M	2	Profitable	Other Capital Markets/Institutions	F. Warren Hellman
Ensera	24-Sep-2001	Buyout/LBO (Add-on) [†]	\$14.00M	3	Generating Revenue	Business/Productivity Software	Marco Hellman
^x Nasdaq	03-May-2001	Convertible Debt	\$240.00M		Profitable	Other Capital Markets/Institutions	F. Warren Hellman
^x Formula One World Championship	01-Mar-2001	Buyout/LBO	\$872.20M	1	Generating Revenue	Other Restaurants, Hotels and Leisure	
^x Upromise	06-Nov-2000	Early Stage VC (Series B)	\$55.00M	5	Generating Revenue	Application Software	Philip Hammarskjold

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
*Enlyte Group	22-Feb-2000	Buyout/LBO	\$239.70M	1	Generating Revenue	Business/Productivity Software	Marco Hellman
*Formula One World Championship	01-Feb-2000	PE Growth/Expansion	\$1.02B		Generating Revenue	Other Restaurants, Hotels and Leisure	
Falcon Cable Holdings	15-Nov-1999	Buyout/LBO (Add-on) [†]	\$2.00B	2	Profitable	Cable Service Providers	
*Blackbaud	19-Oct-1999	Buyout/LBO		1	Generating Revenue/Not Profitable	Financial Software	
Sensors Magazine	16-Jul-1999	Buyout/LBO (Add-on) [†]		3	Generating Revenue	Publishing	John Pasquesi
*T-Mobile US	01-Apr-1999	Spin-Off		4	Profitable	Telecom. Service Providers	John Bunce Jr.
*Young & Rubicam	12-Aug-1996	PE Growth/Expansion			Generating Revenue	Media and Information Services (B2B)	
*Advanstar Communications	15-May-1996	Buyout/LBO	\$177.00M		Generating Revenue	Media and Information Services (B2B)	John Pasquesi
*DG FastChannel	01-Jan-1996	Later Stage VC (Series D)	\$0.54M	10	Generating Revenue	Media and Information Services (B2B)	
*PowerBar	01-Jan-1996	PE Growth/Expansion		1	Generating Revenue	Food Products	
*Clear Channel Outdoor Holdings	01-Aug-1995	Buyout/LBO (MBO)	\$157.00M		Generating Revenue	Media and Information Services (B2B)	
*Eller Media Company	01-Aug-1995	Buyout/LBO			Generating Revenue	Media and Information Services (B2B)	
*Mobile Media Communications	01-Jan-1993	Buyout/LBO	\$180.00M		Generating Revenue	Telecom. Service Providers	
*Franklin Resources	01-Jan-1992	PIPE			Profitable	Other Financial Services	
*Western Wireless	01-Jan-1990	PE Growth/Expansion	\$130.00M	1	Generating Revenue	Telecom. Service Providers	
*Mattel	01-Jan-1984	PIPE		2	Profitable	Recreational Goods	
*C More Entertainment		PE Growth/Expansion		2	Profitable	Broadcasting, Radio and Television	

Company Name	Deal Date	Deal Type	Deal Size	Co-Investors	Company Stage	Industry	Lead Partner
^x NIC		PE Growth/Expansion			Profitable	Government	
Smith Brothers Collision Center		Buyout/LBO (Add-on) [†]		2	Generating Revenue	Automotive	
eRx Network		Buyout/LBO		1	Generating Revenue	Enterprise Systems (Healthcare)	

[†] Indicates an Add-On

^E Estimated

^x Investor Exited Deal

All Exits (120)

Company Name	Exit Date	Exit Type	Exit Size	Status	Buyers
SimpliSafe	03-Sep-2025	Buyout/LBO (Secondary)		Bidding	GTCR
Enverus	06-Aug-2025	Buyout/LBO (Secondary)	\$6.50B	Announced	Blackstone
Verisure	20-Mar-2025	IPO	\$3.31B	Announced	
Cortex (Healthcare Technology Systems)	24-Jan-2025	Merger/Acquisition	\$277.00M	Completed	Boston Scientific
Nexi	01-Jan-2025	Merger/Acquisition		Completed	Worldline
Lancaster Marketplace	30-Dec-2024	Corporate Asset Purchase	\$12.25M	Completed	Rhino Investments Group
Medline Industries	23-Jul-2024	IPO	\$5.00B	Announced	
Snap One	14-Jun-2024	Merger/Acquisition	\$1.41B	Completed	Resideo Technologies
Splunk	18-Mar-2024	Merger/Acquisition	\$28.00B	Completed	Cisco Systems
AlterG	11-Aug-2023	Merger/Acquisition	\$22.10M	Completed	Lifeward
TeamSystem	19-May-2023	Secondary Transaction - Private	\$660.48M	Completed	Silver Lake
Pharmaceutical Product Development	08-Dec-2021	Merger/Acquisition	\$16.04B	Completed	Thermo Fisher Scientific

Company Name	Exit Date	Exit Type	Exit Size	Status	Buyers
Snap One	28-Jul-2021	IPO	\$249.30M	Completed	
Nets	01-Jul-2021	Merger/Acquisition	\$9.20B	Completed	Nexi
Sprinklr	23-Jun-2021	IPO	\$266.00M	Completed	
Nexant	12-May-2021	Buyout/LBO (Add-on) [†]		Completed	BV Investment Partners Resource Innovations
Allfunds Bank	23-Apr-2021	IPO	\$2.24B	Completed	
NIC	21-Apr-2021	Merger/Acquisition	\$2.32B	Completed	Tyler Technologies
TeamSystem	15-Jan-2021	Buyout/LBO (Secondary)		Completed	Hellman & Friedman Hg
GCM Grosvenor	17-Nov-2020	Reverse Merger	\$250.00M	Completed	CF Finance Acquisition
Claritev	08-Oct-2020	Reverse Merger	\$1.10B	Completed	Churchill Capital Corp III
Pharmaceutical Product Development	18-Sep-2020	Secondary Transaction - Open Market	\$1.23B	Completed	
Associated Materials	03-Aug-2020	Buyout/LBO (Secondary)		Completed	Oak Hill Advisors
X-Chem	03-Jun-2020	Buyout/LBO (Secondary)		Completed	GHO Capital
eRx Network	01-May-2020	Buyout/LBO (Secondary) [†]	\$400.85M	Completed	Blackstone Change Healthcare
Grocery Outlet Holding	23-Apr-2020	Secondary Transaction - Open Market	\$586.50M	Completed	
Pharmaceutical Product Development	06-Feb-2020	IPO	\$1.86B	Completed	
Action Nederland	29-Jan-2020	Buyout/LBO (Secondary)		Completed	Ardian HarbourVest Partners
Grocery Outlet Holding	29-Jan-2020	Secondary Transaction - Open Market	\$528.00M	Completed	

Company Name	Exit Date	Exit Type	Exit Size	Status	Buyers
Grocery Outlet Holding	04-Oct-2019	Secondary Transaction - Open Market	\$438.75M	Completed	
Scout24	05-Sep-2019	Secondary Transaction - Private	\$348.00M	Completed	
Change Healthcare	27-Jun-2019	IPO	\$640.70M	Completed	
Grocery Outlet Holding	20-Jun-2019	IPO	\$378.13M	Completed	
Verisure	04-Apr-2019	PE Growth/Expansion	\$854.09M	Completed	Corporacion Financiera Alba
Renaissance Learning	20-Jul-2018	Buyout/LBO (Secondary)		Completed	Francisco Partners GEMS Group Holdings NB Private Equity Partners Private Equity Holding SEB Private Equity The Rise Fund W Capital Partners
Openlink Financial	22-Mar-2018	Buyout/LBO (Secondary) [†]	\$1.00B	Completed	ION Group The Carlyle Group
Scout24	15-Feb-2018	Secondary Transaction - Open Market	\$419.79M	Completed	
Scout24	04-Oct-2017	Secondary Transaction - Open Market	\$405.57M	Completed	
Verisure	01-Jul-2017	Secondary Transaction - Private		Completed	GIC Private
Scout24	23-Sep-2016	Secondary Transaction - Open Market	\$460.36M	Completed	
Change Healthcare	28-Jun-2016	Merger/Acquisition	\$4.45B	Completed	McKesson
Hostelworld Group	22-Apr-2016	Secondary Transaction - Open Market	\$86.76M	Completed	

Company Name	Exit Date	Exit Type	Exit Size	Status	Buyers
Scout24	18-Apr-2016	Secondary Transaction - Open Market	\$407.02M	Completed	
Ellucian	31-Dec-2015	Buyout/LBO (Secondary)	\$3.50B	Completed	Leonard Green & Partners TPG
CARFAX Canada	24-Dec-2015	Merger/Acquisition	\$459.20M	Completed	IHS Markit
Hostelworld Group	28-Oct-2015	IPO	\$203.28M	Completed	
Surge Medicine	08-Oct-2015	Bankruptcy: Liquidation		Completed	
Scout24	01-Oct-2015	IPO	\$1.31B	Completed	
Wood Mackenzie	19-May-2015	Merger/Acquisition	\$2.89B	Completed	Verisk Analytics
SSP (United Kingdom)	12-Mar-2015	Buyout/LBO (MBO)	\$331.20M	Completed	LDC Scottish Equity Partners
Gaztransport & Technigaz	27-Jan-2015	Secondary Transaction - Private		Completed	
Internet Brands	31-Aug-2014	Buyout/LBO (MBO)	\$1.10B	Completed	Kohlberg Kravis Roberts Temasek Holdings
Sheridan Healthcare	17-Jul-2014	Merger/Acquisition	\$2.35B	Completed	AmSurg
Artisan Partners Asset Management	16-Jun-2014	Secondary Transaction - Open Market	\$101.25M	Completed	
Adchemy	05-May-2014	Merger/Acquisition		Completed	Walmart Global Tech
Catalina Marketing (Saint Petersburg)	09-Apr-2014	Buyout/LBO (Secondary)	\$2.50B	Completed	Berkshire Partners Carlyle AlInvest Crescent Capital Group HarbourVest Partners
Artisan Partners Asset Management	07-Mar-2014	2PO	\$500.55M	Completed	
Sedgwick Claims Management Services	28-Feb-2014	Buyout/LBO (MBO)	\$2.40B	Completed	Kohlberg Kravis Roberts Stone Point Capital

Company Name	Exit Date	Exit Type	Exit Size	Status	Buyers
Gaztransport & Technigaz	26-Feb-2014	IPO	\$847.16M	Completed	
Sharebridge Private Equity Consolidated	01-Jan-2014	Buyout/LBO (Add-on) [†]		Completed	A&M Capital Dowling Capital Partners Kohlberg Kravis Roberts Stone Point Capital Vanbridge Holdings
The Nielsen Company	22-Nov-2013	Secondary Transaction - Open Market	\$1.18B	Completed	
Artisan Partners Asset Management	01-Nov-2013	2PO	\$268.80M	Completed	
LPL Financial Holdings	14-Aug-2013	Secondary Transaction - Open Market		Completed	
The Nielsen Company	15-May-2013	Secondary Transaction - Open Market	\$1.23B	Completed	
Artisan Partners Asset Management	01-Mar-2013	IPO	\$331.62M	Completed	
Embanet	25-Nov-2012	Merger of Equals		Completed	EmbanetCompass
Daikin Comfort Technologies North America	01-Nov-2012	Merger/Acquisition	\$3.70B	Completed	Daikin Industries
Getty Images Holdings	18-Oct-2012	Buyout/LBO (MBO)	\$3.30B	Completed	The Carlyle Group
GeoVera Holdings	08-Aug-2012	Buyout/LBO (Secondary)		Completed	Flexpoint Ford New Capital Partners
AlixPartners	29-Jun-2012	Buyout/LBO (Secondary)	\$1.00B	Completed	CVC Capital Partners
LPL Financial Holdings	02-May-2012	Secondary Transaction - Open Market	\$500.25M	Completed	
The Nielsen Company	20-Mar-2012	Secondary Transaction - Private	\$907.50M	Completed	

Company Name	Exit Date	Exit Type	Exit Size	Status	Buyers
IRIS Software Group	20-Dec-2011	Buyout/LBO (Secondary)		Completed	Hg
Change Healthcare	02-Nov-2011	Buyout/LBO (Secondary)	\$3.00B	Completed	Blackstone Carlyle AlInvest Crimson Ventures West Health
Mondrian Investment Partners	29-Jul-2011	Secondary Transaction - Private		Completed	
Activant Solutions	16-May-2011	Buyout/LBO (Secondary) [†]	\$1.02B	Completed	Apax Partners Epicor Software
Gartmore Group	04-Apr-2011	Merger/Acquisition	\$590.15M	Completed	Janus Henderson Investors
The Nielsen Company	26-Jan-2011	IPO	\$1.64B	Completed	
LPL Financial Holdings	18-Nov-2010	IPO	\$469.72M	Completed	
Vertafore	29-Jul-2010	Buyout/LBO (Secondary)	\$1.40B	Completed	TPG
Intergraph	01-Jul-2010	Merger/Acquisition	\$2.13B	Completed	Hexagon
Axel Springer	01-Jan-2010	Secondary Transaction - Open Market		Completed	
Gartmore Group	11-Dec-2009	IPO	\$562.15M	Completed	
PARIS RE Holdings	02-Oct-2009	Merger/Acquisition	\$2.00B	Completed	PartnerRe
PartnerRe	02-Oct-2009	Buyout/LBO (Secondary)		Completed	Ridgemont Equity Partners Stone Point Capital
Change Healthcare	11-Aug-2009	IPO	\$367.35M	Completed	
Radio & Records	06-Mar-2009	Out of Business		Completed	
Axel Springer	19-Dec-2008	Secondary Transaction - Open Market	\$160.76M	Completed	Deutsche Bank
Aplifi	14-Jul-2008	Buyout/LBO		Completed	Bluff Point Associates

Company Name	Exit Date	Exit Type	Exit Size	Status	Buyers
DoubleClick	11-Mar-2008	Merger/Acquisition	\$3.10B	Completed	Alphabet
Nasdaq	13-Nov-2007	Secondary Transaction - Open Market	\$1.02B	Completed	
Enlyte Group	28-Mar-2007	Buyout/LBO (Secondary)	\$500.00M	Completed	Aurora Capital Partners General Electric Asset Management Norwest Equity Partners
ProSiebenSat.1 Media	05-Mar-2007	Buyout/LBO (Secondary)	\$19.26B	Completed	Kohlberg Kravis Roberts Permira
Arch Capital Group	01-Mar-2007	Secondary Transaction - Open Market		Completed	
Axel Springer	07-Dec-2006	Secondary Transaction - Open Market	\$574.80M	Completed	
Upromise	23-Aug-2006	Merger/Acquisition	\$308.00M	Completed	Sallie Mae
Nasdaq	10-Feb-2006	2PO	\$555.81M	Completed	
Texas Genco	02-Feb-2006	Merger/Acquisition	\$8.30B	Completed	NRG Energy
Blackbaud	01-Jan-2006	Secondary Transaction - Open Market		Completed	
Blackbaud	22-Jul-2004	IPO	\$64.79M	Completed	
Digitas	05-Aug-2003	Secondary Transaction - Open Market	\$105.00M	Completed	
Nasdaq	01-Jul-2002	IPO		Completed	
Formula One World Championship	01-Jan-2002	Buyout/LBO (Secondary)		Completed	Bayern LB J.P. Morgan (New York) Lehman Brothers
T-Mobile US	31-May-2001	Merger/Acquisition		Completed	Deutsche Telekom
Advanstar Communications	15-Aug-2000	Buyout/LBO (Secondary)	\$900.00M	Completed	aPriori Capital Partners

Company Name	Exit Date	Exit Type	Exit Size	Status	Buyers
PowerBar	31-Mar-2000	Merger/Acquisition	\$375.00M	Completed	Nestlé
Digitas	14-Mar-2000	IPO	\$223.20M	Completed	
NIC	15-Jul-1999	IPO	\$156.00M	Completed	
Young & Rubicam	28-May-1999	2PO		Completed	
Young & Rubicam	12-May-1998	IPO	\$415.00M	Completed	
Mobile Media Communications	01-Jan-1998	Merger/Acquisition	\$649.00M	Completed	Arch Wireless
Clear Channel Outdoor Holdings	26-Feb-1997	Merger/Acquisition	\$725.00M	Completed	iHeartMedia
Eller Media Company	01-Jan-1997	Merger/Acquisition		Completed	Clear Channel Communications
Franklin Resources	01-Jan-1997	Secondary Transaction - Open Market		Completed	
Mobile Media Communications	01-Jan-1997	Bankruptcy: Admin/Reorg		Completed	
Western Wireless	23-May-1996	IPO	\$297.27M	Completed	
DG FastChannel	06-Feb-1996	IPO		Completed	
ABRA Auto Body & Glass		Merger/Acquisition		Completed	
C More Entertainment		Merger/Acquisition		Completed	Bonnier (Sweden)
Mattel		Secondary Transaction - Open Market		Completed	

† Indicates an Add-On

Co-Investors & Add-Ons (3050)

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
AAC Capital	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
ABRA Auto Body & Glass	CORPO Collision Center	Buyout/LBO [†]		13-Oct-2014	Completed
ABRA Auto Body & Glass	Keenan Auto Body	Buyout/LBO [†]	\$20.00M	01-May-2015	Completed
ABRA Auto Body & Glass	Auto Werks of Northbrook	Buyout/LBO ^{†*}		03-Oct-2014	Completed
ABRA Auto Body & Glass	Autohound Collision	Buyout/LBO [†]		25-Jul-2014	Completed
ABRA Auto Body & Glass	Interstate Glass (4 Repair Centers)	Buyout/LBO ^{†*}		13-Mar-2015	Completed
ABRA Auto Body & Glass	Express Auto Glass	Buyout/LBO [†]		21-Sep-2015	Completed
ABRA Auto Body & Glass	Collisionmax Auto Body	Buyout/LBO [†]		30-Oct-2015	Completed
ABRA Auto Body & Glass	Indy Collision Center	Buyout/LBO [†]		04-May-2015	Completed
ABRA Auto Body & Glass	Four Sons Auto Glass	Buyout/LBO [†]		08-Jul-2016	Completed
ABRA Auto Body & Glass	Henry Bros Auto Body & Paint Shop	Buyout/LBO [†]		31-Jul-2015	Completed
ABRA Auto Body & Glass	Consolidated Collision Center	Buyout/LBO [†]		15-Dec-2014	Completed
ABRA Auto Body & Glass	Acacia Park Auto Body	Buyout/LBO [†]		10-Apr-2015	Completed
ABRA Auto Body & Glass	Barrett's Collision Centre	Buyout/LBO [†]		06-Feb-2015	Completed
ABRA Auto Body & Glass	Kimble Glass Services	Buyout/LBO ^{†*}		22-Aug-2014	Completed
ABRA Auto Body & Glass	Pro Automotive Collision	Buyout/LBO [†]		23-Oct-2015	Completed
ABRA Auto Body & Glass	Kadels Auto Body	Buyout/LBO [†]		10-Jul-2015	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
ABRA Auto Body & Glass	Consolidated Auto Service Center	Buyout/LBO ^{†*}		19-Sep-2014	Completed
ABRA Auto Body & Glass	Reflections Auto Body (Milwaukee Branch)	Buyout/LBO [†]		30-Jun-2015	Completed
ABRA Auto Body & Glass	Caliber Collision	Buyout/LBO [†]		24-Jan-2019	Completed
ABRA Auto Body & Glass	HFH Collision	Buyout/LBO ^{†*}		12-Apr-2013	Completed
ABRA Auto Body & Glass	Ochre Media	Buyout/LBO [†]		08-Jul-2016	Completed
ABRA Auto Body & Glass	Quality Werks Collision Center	Buyout/LBO [†]		17-Apr-2015	Completed
ABRA Auto Body & Glass	Crash1 Off Alpine	Buyout/LBO [†]		27-Feb-2015	Completed
ABRA Auto Body & Glass	Triangle Auto Body	Buyout/LBO ^{†*}		20-Feb-2015	Completed
ABRA Auto Body & Glass	USA Collision Centers (Four Centers)	Buyout/LBO [†]		05-Sep-2014	Completed
ABRA Auto Body & Glass	Lehman's Garage	Buyout/LBO [†]		28-Aug-2015	Completed
ABRA Auto Body & Glass	GW Auto Rebuild	Buyout/LBO [†]		06-Feb-2015	Completed
ABRA Auto Body & Glass	Deals Glass Services	Buyout/LBO ^{†*}		22-Aug-2014	Completed
ABRA Auto Body & Glass	Murdock Chevrolet	Buyout/LBO [†]		15-Dec-2014	Completed
ABRA Auto Body & Glass	Zaks Hi Tech Collision Center	Buyout/LBO [†]		10-Apr-2015	Completed
ABRA Auto Body & Glass	Collision Plus Auto Body Repair Centers	Buyout/LBO [†]		28-Dec-2012	Completed
ABRA Auto Body & Glass	Tennessee Collision Repair	Buyout/LBO [†]		15-Aug-2014	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
ABRA Auto Body & Glass	Collision Automotive Repair Specialists	Buyout/LBO [†]		15-Dec-2014	Completed
ABRA Auto Body & Glass	Prestige Collision Specialists	Buyout/LBO [†]		24-Jul-2015	Completed
ABS Capital Partners	Tangozebra	Buyout/LBO [†]	\$15.00M	01-Mar-2007	Completed
Abu Dhabi Investment Authority	Zendesk	Buyout/LBO	\$10.20B	22-Nov-2022	Completed
Abu Dhabi Investment Authority	Stat Health Care	Buyout/LBO [†]		11-Jan-2023	Completed
Abu Dhabi Investment Authority	Poker (Italy)	Buyout/LBO [†]		01-Mar-2024	Completed
Abu Dhabi Investment Authority	xstream	Buyout/LBO [†]		18-Sep-2025	Completed
Abu Dhabi Investment Authority	HyperArc	Buyout/LBO [†]		14-Jun-2025	Completed
Abu Dhabi Investment Authority	Change Capital	Buyout/LBO [†]		25-Jun-2024	Completed
Abu Dhabi Investment Authority	ClicData	Buyout/LBO [†]		03-Jul-2025	Completed
Abu Dhabi Investment Authority	Distrito K	Buyout/LBO [†]		17-Sep-2024	Completed
Abu Dhabi Investment Authority	Ultimate (Automation/Workflow Software)	Buyout/LBO [†]		13-Mar-2024	Completed
Abu Dhabi Investment Authority	Local Measure International	Buyout/LBO [†]		20-May-2025	Completed
Abu Dhabi Investment Authority	Pharmaceutical Product Development	PE Growth/Expansion		08-May-2017	Completed
Abu Dhabi Investment Authority	Morning (Tel Aviv)	Buyout/LBO [†]	\$150.00M	22-Dec-2024	Completed
Abu Dhabi Investment Authority	Muscope	Buyout/LBO [†]		18-Nov-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Abu Dhabi Investment Authority	Millesimo	Buyout/LBO [†]		31-Mar-2025	Completed
Abu Dhabi Investment Authority	Medisiss	Buyout/LBO [†]		01-Jan-2012	Completed
Abu Dhabi Investment Authority	PrefConnect	Buyout/LBO [†]		21-Sep-2023	Completed
Abu Dhabi Investment Authority	Sellsy	Buyout/LBO [†]		24-Sep-2025	Announced/In Progress
Abu Dhabi Investment Authority	Tymeshift	Buyout/LBO [†]		22-Jun-2023	Completed
Abu Dhabi Investment Authority	AG Cuffill	Buyout/LBO [†]		07-Mar-2024	Completed
Abu Dhabi Investment Authority	Medline Industries	Buyout/LBO	\$34.00B	05-Jun-2021	Completed
Abu Dhabi Investment Authority	Klaus	Buyout/LBO [†]		12-Feb-2024	Completed
Abu Dhabi Investment Authority	Golden Soft	Buyout/LBO [†]		27-Feb-2025	Completed
Abu Dhabi Investment Authority	Ecolab (Global Surgical Solutions)	Buyout/LBO [†]	\$950.00M	01-Aug-2024	Completed
Abu Dhabi Investment Authority	Clémentine	Buyout/LBO [†]		01-Jul-2024	Completed
Abu Dhabi Investment Authority	United Medco	Buyout/LBO [†]		10-Jan-2024	Completed
Accession Capital Partners	T-Mobile US	Spin-Off		01-Apr-1999	Completed
Ackerley Partners	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed
Activant Solutions	Eclipse (IT Consulting and Outsourcing)	Buyout/LBO [†]	\$100.50M	17-Aug-2007	Completed
Activant Solutions	Activant Silk Systems	Buyout/LBO [†]	\$6.90M	31-May-2007	Completed
Advanstar Communications	Sensors Magazine	Buyout/LBO [†]		16-Jul-1999	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Advent International	CCV Schweiz	Buyout/LBO [†]		21-Oct-2020	Completed
Advent International	Poplatek Payments	Buyout/LBO [†]		23-Dec-2019	Completed
Advent International	Concardis	Buyout/LBO [†]		07-Jan-2019	Completed
Advent International	Przelewy24	Buyout/LBO [†]		02-Aug-2019	Completed
Advent International	Poplatek (Espoo)	Buyout/LBO [†]		23-Dec-2019	Completed
Advent International	Polskie ePłatności	Buyout/LBO [†]	\$500.00M	14-Oct-2020	Completed
Advent International	Nexi	Buyout/LBO	\$2.20B	18-Dec-2015	Completed
Advent International	eCard	Buyout/LBO [†]	\$73.00M	04-Jan-2019	Completed
Advent International	Embanet	Later Stage VC		02-Aug-2007	Completed
Advent International	Nets	Buyout/LBO	\$33.07B	13-Feb-2018	Completed
AI Life Sciences Investments	Cortex (Healthcare Technology Systems)	PE Growth/Expansion	\$133.00M	07-Dec-2023	Completed
Ajax Health	Puzzle Medical Devices	Later Stage VC [*]	\$25.00M	07-Feb-2023	Completed
Ajax Health	MedAlliance (Drug Delivery)	Buyout/LBO [†]	\$1.14B	01-Jan-2023	Completed
Ajax Health	Cordis	Buyout/LBO	\$1.00B	02-Aug-2021	Completed
Alaska Permanent Capital Management	Brady Risk Management	Buyout/LBO [†]		01-Apr-2023	Completed
Alaska Permanent Capital Management	AG Direct Hail Insurance	Buyout/LBO [†]		23-Feb-2023	Completed
Alaska Permanent Capital Management	Invensure Insurance Brokers	Buyout/LBO [†]		01-Dec-2022	Completed
Alaska Permanent Fund	F.A.R.E. Healthcare	Buyout/LBO [†]		06-Sep-2023	Completed
Alaska Permanent Fund	Shepard Walton King Insurance	Buyout/LBO [†]		07-Dec-2021	Completed
Alaska Permanent Fund	E-Insure Services	Buyout/LBO [†]		07-Jun-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alaska Permanent Fund	Marketing Management Associates	Buyout/LBO [†]		08-Apr-2022	Completed
Alaska Permanent Fund	Desilets Insurance Brokers	Buyout/LBO [†]		07-Mar-2018	Completed
Alaska Permanent Fund	Horizon Insurance	Buyout/LBO [†]		09-Aug-2023	Completed
Alaska Permanent Fund	Safe Harbor Group	Buyout/LBO [†]		12-Oct-2021	Completed
Alaska Permanent Fund	Galon Insurance Brokers	Buyout/LBO [†]		02-Feb-2021	Completed
Alaska Permanent Fund	Insureon	Buyout/LBO [†]		01-Mar-2022	Completed
Alaska Permanent Fund	Preferred Benefits Services Agency	Buyout/LBO [†]		12-Jan-2021	Completed
Alaska Permanent Fund	McNellis & Company	Buyout/LBO [†]		08-Sep-2021	Completed
Alaska Permanent Fund	Compass Insurance Services	Buyout/LBO [†]		07-Jul-2022	Completed
Alaska Permanent Fund	HORAN Health	Buyout/LBO [†]		01-Jun-2023	Completed
Alaska Permanent Fund	The Spofford Group	Buyout/LBO [†]		17-Dec-2021	Completed
Alaska Permanent Fund	Wealthplan Advisors	Buyout/LBO [†]		03-Aug-2022	Completed
Alaska Permanent Fund	Dissinger Reed	Buyout/LBO [†]		16-Aug-2021	Completed
Alaska Permanent Fund	Williford Insurance Group	Buyout/LBO [†]		04-May-2022	Completed
Alaska Permanent Fund	Rogersworks	Buyout/LBO [†]		18-Oct-2021	Completed
Alaska Permanent Fund	Grace & Porta Benefits	Buyout/LBO [†]		27-Jul-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alaska Permanent Fund	RIMS Insurance Brokerage Corporation	Buyout/LBO [†]		08-May-2019	Completed
Alaska Permanent Fund	Baystate Fiduciary Advisors	Buyout/LBO [†]		11-Nov-2020	Completed
Alaska Permanent Fund	Weiss-Schantz Agency	Buyout/LBO [†]		13-Apr-2023	Completed
Alaska Permanent Fund	Clarity Benefits Group	Buyout/LBO [†]		07-May-2019	Completed
Alaska Permanent Fund	KT&D	Buyout/LBO [†]		05-Aug-2022	Completed
Alaska Permanent Fund	Chatham Insurance Partners	Buyout/LBO [†]		14-Dec-2022	Completed
Alaska Permanent Fund	Hanson Insurance Group	Buyout/LBO [†]		03-May-2022	Completed
Alaska Permanent Fund	Trusted Capital Group	Buyout/LBO [†]		01-Jul-2021	Completed
Alaska Permanent Fund	Assured Risk Advisors	Buyout/LBO [†]		03-Aug-2023	Completed
Alaska Permanent Fund	Johnston Lewis Associates	Buyout/LBO [†]		08-Jun-2023	Completed
Alaska Permanent Fund	Tanna Insurance	Buyout/LBO [†]		01-Nov-2021	Completed
Alaska Permanent Fund	Golden Ears Insurance Services	Buyout/LBO [†]		02-Aug-2023	Completed
Alaska Permanent Fund	Shinstrom & Norman	Buyout/LBO [†]		10-Aug-2023	Completed
Alaska Permanent Fund	Golden Corner Wealth Advisors	Buyout/LBO [†]		07-Jul-2023	Completed
Alaska Permanent Fund	Advisory Businesses Of Quintes	Buyout/LBO [†]		06-Oct-2022	Completed
Alaska Permanent Fund	Bubrig Insurance Agency	Buyout/LBO [†]		04-Aug-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alaska Permanent Fund	Incentive Systems	Buyout/LBO [†]		05-Mar-2021	Completed
Alaska Permanent Fund	Gold Sky Benefits	Buyout/LBO [†]		09-Dec-2021	Completed
Alaska Permanent Fund	Nolen Associates	Buyout/LBO [†]		11-Dec-2018	Completed
Alaska Permanent Fund	Hobson Insurance	Buyout/LBO [†]		05-Apr-2023	Completed
Alaska Permanent Fund	Niedermeyer Risk Management	Buyout/LBO [†]		09-Mar-2022	Completed
Alaska Permanent Fund	Strategic Benefit Resources	Buyout/LBO [†]		09-Jan-2020	Completed
Alaska Permanent Fund	Dwight W. Andrus Insurance (Assets in Louisiana)	Buyout/LBO [†]	\$190.00M	02-Mar-2023	Completed
Alaska Permanent Fund	Jaimac Risk Management	Buyout/LBO [†]		12-Aug-2022	Completed
Alaska Permanent Fund	Benefit Partners Group (Certain Assets of Libertyville)	Buyout/LBO [†]		10-Dec-2021	Completed
Alaska Permanent Fund	Pete Webb Agency	Buyout/LBO [†]		09-Jul-2021	Completed
Alaska Permanent Fund	401(k) Advisors	Buyout/LBO [†]		06-Apr-2022	Completed
Alaska Permanent Fund	Guide Insurance Services	Buyout/LBO [†]		05-Oct-2022	Completed
Alaska Permanent Fund	Raffa Financial Services	Buyout/LBO [†]		06-Jan-2022	Completed
Alaska Permanent Fund	AM Insurance Services of Miami	Buyout/LBO [†]		08-Dec-2022	Completed
Alaska Permanent Fund	Canadian Hail Agencies	Buyout/LBO [†]		23-Feb-2023	Completed
Alaska Permanent Fund	Gonzalez & Goenaga	Buyout/LBO [†]		12-Apr-2016	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alaska Permanent Fund	Shaver-Robichaux Agency	Buyout/LBO [†]		08-Jul-2022	Completed
Alaska Permanent Fund	Finn & Stone	Buyout/LBO [†]		03-Mar-2021	Completed
Alaska Permanent Fund	Dale Barton Agency	Buyout/LBO [†]		12-Dec-2022	Completed
Alaska Permanent Fund	Basi Insurance Services	Buyout/LBO [†]		13-Dec-2021	Completed
Alaska Permanent Fund	Midland Agency Insurance	Buyout/LBO [†]		11-Mar-2022	Completed
Alaska Permanent Fund	Direct Advisors	Buyout/LBO [†]		07-Sep-2022	Completed
Alaska Permanent Fund	Coast to Coast Insurance Brokers	Buyout/LBO [†]		10-Jan-2023	Completed
Alaska Permanent Fund	Purselley Associates	Buyout/LBO [†]		20-Sep-2021	Completed
Alaska Permanent Fund	IBG Financial Partners	Buyout/LBO [†]		01-Apr-2021	Completed
Alaska Permanent Fund	Aegis Retirement Group	Buyout/LBO [†]		01-Jul-2021	Completed
Alaska Permanent Fund	Epstein Financial	Buyout/LBO [†]		02-Jun-2021	Completed
Alaska Permanent Fund	Garnett Retirement Group	Buyout/LBO [†]		07-Jan-2021	Completed
Alaska Permanent Fund	Shields Insurance Agency	Buyout/LBO [†]		19-Jan-2021	Completed
Alaska Permanent Fund	H.W. Hollinger	Buyout/LBO [†]		06-Oct-2021	Completed
Alaska Permanent Fund	Kilbride & Harris Insurance Services	Buyout/LBO [†]		09-Aug-2019	Completed
Alaska Permanent Fund	Sandy Spring Insurance	Buyout/LBO [†]		01-Jun-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alaska Permanent Fund	Business Benefits Resource	Buyout/LBO [†]		08-Jun-2023	Completed
Alaska Permanent Fund	Chun-Ha Insurance Services	Buyout/LBO [†]		04-Apr-2022	Completed
Alaska Permanent Fund	Shattuck & Grummett Insurance	Buyout/LBO [†]		03-Dec-2021	Completed
Alaska Permanent Fund	OSA Insurance Brokerage Services	Buyout/LBO [†]		05-Jan-2023	Completed
Alaska Permanent Fund	Rider Insurance Group	Buyout/LBO [†]		04-Nov-2021	Completed
Alaska Permanent Fund	LISSC	Buyout/LBO [†]		02-Mar-2017	Completed
Alaska Permanent Fund	APEX Global Benefit Management System	Buyout/LBO [†]		06-May-2022	Completed
Alaska Permanent Fund	Western Assurance	Buyout/LBO [†]		04-Mar-2022	Completed
Alaska Permanent Fund	Verity Insurance Services	Buyout/LBO [†]		08-Oct-2021	Completed
Alaska Permanent Fund	Creative Benefits & Insurance Solutions	Buyout/LBO [†]		11-Jan-2023	Completed
Alaska Permanent Fund	Kornerstone	Buyout/LBO [†]		02-Feb-2022	Completed
Alaska Permanent Fund	Edbrooke/Stelcner and Associates	Buyout/LBO [†]		17-Jul-2023	Completed
Alaska Permanent Fund	Gibson Deland Insurance (Marine Book of Business)	Buyout/LBO [†]		06-Nov-2019	Completed
Alaska Permanent Fund	United Shortline Insurance Services	Buyout/LBO [†]		01-Nov-2020	Completed
Alaska Permanent Fund	Taylor Advisors	Buyout/LBO [†]		02-Mar-2022	Completed
Alaska Permanent Fund	Nationwide Insurance Company (Property and Casualty Books of Business)	Buyout/LBO [†]		07-Aug-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alaska Permanent Fund	Perennial Pension & Wealth	Buyout/LBO [†]		15-Aug-2019	Completed
Alaska Permanent Fund	G.P. Barich Insurance Agency	Buyout/LBO [†]		13-Dec-2018	Completed
Alaska Permanent Fund	Peel & Holland	Buyout/LBO [†]		10-Apr-2022	Completed
Alaska Permanent Fund	National Home Warranty Group	Buyout/LBO [†]		04-Oct-2021	Completed
Alaska Permanent Fund	Hometown Insurance Brokers	Buyout/LBO [†]		11-Sep-2018	Completed
Alaska Permanent Fund	JP Griffin Group	Buyout/LBO [†]		15-Dec-2021	Completed
Alaska Permanent Fund	Physicians Risk Associates Insurance Agency	Buyout/LBO [†]		07-Jun-2022	Completed
Alaska Permanent Fund	Custom Results Corporate Consulting	Buyout/LBO [†]		08-Jun-2023	Completed
Alaska Permanent Fund	Disability Book of Business	Buyout/LBO [†]		16-Aug-2019	Completed
Alaska Permanent Fund	Joseph Aiello & Associates	Buyout/LBO [†]		08-Jun-2023	Completed
Alaska Permanent Fund	Cottenie and Gardner	Buyout/LBO [†]		04-Jun-2019	Completed
Alaska Permanent Fund	Jerry Baird Insurance Agency	Buyout/LBO [†]		11-Oct-2021	Completed
Alaska Permanent Fund	GRP Financial California	Buyout/LBO [†]		14-Dec-2021	Completed
Alaska Permanent Fund	Glacier Insurance of Libby	Buyout/LBO [†]		03-Mar-2023	Completed
Alaska Permanent Fund	Health Insurance Consultants	Buyout/LBO [†]		08-Jun-2023	Completed
Alaska Permanent Fund	Kelliher Agencies	Buyout/LBO [†]		06-May-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alaska Permanent Fund	Red Rock Financial	Buyout/LBO [†]		10-Apr-2023	Completed
Alaska Permanent Fund	Gregory Benefits & Consulting	Buyout/LBO [†]		08-Dec-2021	Completed
Alaska Permanent Fund	Ibex Enterprises (Life and Health Assets)	Buyout/LBO [†]		01-Jun-2023	Completed
Alaska Permanent Fund	Tilghman Insurance of Myrtle Beach	Buyout/LBO [†]		08-Sep-2022	Completed
Alaska Permanent Fund	GJJK	Buyout/LBO [†]		07-Sep-2023	Completed
Alaska Permanent Fund	Horizon Agency	Buyout/LBO [†]		04-Apr-2023	Completed
Alaska Permanent Fund	Calculated Risk Advisors	Buyout/LBO [†]		01-Nov-2021	Completed
Alaska Permanent Fund	M.B.I. Group	Buyout/LBO [†]		04-Mar-2019	Completed
Alaska Permanent Fund	The Wooditch Company	Buyout/LBO [†]		02-May-2023	Completed
Alaska Permanent Fund	Beacon Hill Wealth Services (Retirement and Private Wealth Book of Business)	Buyout/LBO [†]		07-Jun-2021	Completed
Alaska Permanent Fund	Wellspring Insurance Agency	Buyout/LBO [†]		02-Mar-2021	Completed
Alaska Permanent Fund	Stop Loss Insurance Brokers	Buyout/LBO [†]		27-Jul-2022	Completed
Alaska Permanent Fund	WhartonHill Advisors	Buyout/LBO [†]		15-Aug-2019	Completed
Alaska Permanent Fund	Risk Point Consulting	Buyout/LBO [†]		16-Jul-2021	Completed
Alaska Permanent Fund	Resource Insurance Services	Buyout/LBO [†]		03-May-2019	Completed
Alaska Permanent Fund	Kelly King Insurance Services	Buyout/LBO [†]		02-May-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alaska Permanent Fund	Great North Insurance Services	Buyout/LBO [†]		05-May-2022	Completed
Alaska Permanent Fund	HUB Retirement and Wealth Management	Buyout/LBO [†]		04-Sep-2019	Completed
Alaska Permanent Fund	Bridgecreek Investment Management	Buyout/LBO [†]		10-Nov-2022	Completed
Alaska Permanent Fund	MPE Employee Benefit Services	Buyout/LBO [†]		18-Jan-2021	Completed
Alaska Permanent Fund	Fiducia Group	Buyout/LBO [†]		01-Dec-2021	Completed
Alaska Permanent Fund	Millennium Advisory Services	Buyout/LBO [†]		27-Aug-2021	Completed
Alaska Permanent Fund	Heritage Wealth Management Group	Buyout/LBO [†]		20-Jun-2022	Completed
Alaska Permanent Fund	Phil Bailey & Associates	Buyout/LBO [†]		04-Sep-2019	Completed
Alaska Permanent Fund	Miniter Group	Buyout/LBO [†]		17-Aug-2022	Completed
Alaska Permanent Fund	Ward Insurance	Buyout/LBO [†]		06-Jul-2021	Completed
Alaska Permanent Fund	Intercontinental Growth Strategies	Buyout/LBO [†]		08-Aug-2022	Completed
Alaska Permanent Fund	Priority Insurance Associates	Buyout/LBO [†]		03-Nov-2022	Completed
Alaska Permanent Fund	Hiles-McLeod Insurance	Buyout/LBO [†]		05-Aug-2021	Completed
Alaska Permanent Fund	First Florida Insurance	Buyout/LBO [†]		08-Jul-2021	Completed
Alaska Permanent Fund	Benefit Strategies Agency	Buyout/LBO [†]		04-Mar-2021	Completed
Alaska Permanent Fund	Plan Sponsor Consultants	Buyout/LBO [†]		02-Apr-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alaska Permanent Fund	Kuhl Insurance	Buyout/LBO [†]		07-Mar-2022	Completed
Alaska Permanent Fund	Commercial Line Book of Business (Montana)	Buyout/LBO [†]		10-Dec-2019	Completed
Alaska Permanent Fund	Defranco Insurance	Buyout/LBO [†]		06-Apr-2023	Completed
Alaska Permanent Fund	Catto & Catto	Buyout/LBO [†]		02-Dec-2021	Completed
Alaska Permanent Fund	Fortenberry McNamara	Buyout/LBO [†]		01-Feb-2019	Completed
Alaska Permanent Fund	CSi Advisory Services	Buyout/LBO [†]		06-Jun-2022	Completed
Alaska Permanent Fund	JAG Insurance Group	Buyout/LBO [†]		05-Apr-2022	Completed
Alaska Permanent Fund	EPG Insurance Agency	Buyout/LBO [†]		01-Oct-2021	Completed
Alaska Permanent Fund	Hub International (Entertainment Book of Business)	Buyout/LBO [†]		10-Mar-2019	Completed
AlixPartners	Mercatus LLC	Buyout/LBO ^{†*}		02-Aug-2011	Completed
Allfunds Bank	Nordic Fund Market	Buyout/LBO [†]		14-Nov-2019	Completed
Allfunds Bank	Fundinfo (Fund Research Business)	Buyout/LBO [†]		08-Oct-2019	Completed
Allfunds Bank	Finamatrix	Buyout/LBO [†]		17-Jan-2018	Completed
Allfunds Bank	InvestLab	Buyout/LBO [†]		09-Sep-2019	Completed
Allfunds Bank	Andbank Distribuidora de Títulos e Valores Mobiliários	Buyout/LBO		29-Apr-2025	Announced/In Progress
Alpha Wave Global	Wycoff Insurance Agency	Buyout/LBO [†]		05-Jun-2025	Completed
Alpha Wave Global	Scott Held Insurance Agency	Buyout/LBO [†]		04-Jun-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Alpha Wave Global	Henriott Group	Buyout/LBO [†]		01-Apr-2025	Completed
Alpha Wave Global	Fifth Avenue Agency	Buyout/LBO [†]		16-May-2025	Completed
Alpha Wave Global	Fenner & Esler Agency	Buyout/LBO [†]		03-Jun-2025	Completed
Altas Partners	Global Ag Risk Solutions	Buyout/LBO [†]		05-Nov-2024	Completed
Altas Partners	Galon Insurance Brokers	Buyout/LBO [†]		02-Feb-2021	Completed
Altas Partners	Jaimac Risk Management	Buyout/LBO [†]		12-Aug-2022	Completed
Altas Partners	Benefit Partners Group (Certain Assets of Libertyville)	Buyout/LBO [†]		10-Dec-2021	Completed
Altas Partners	SilverStone Group	Buyout/LBO [†]		04-Dec-2019	Completed
Altas Partners	HMBD Insurance Services	Buyout/LBO [†]		03-Dec-2019	Completed
Altas Partners	Millennium Advisory Services	Buyout/LBO [†]		27-Aug-2021	Completed
Altas Partners	Raffa Financial Services	Buyout/LBO [†]		06-Jan-2022	Completed
Altas Partners	Niedermeyer Risk Management	Buyout/LBO [†]		09-Mar-2022	Completed
Altas Partners	Blair Jarcik Insurance	Buyout/LBO [†]		05-Dec-2019	Completed
Altas Partners	D'Onofrio Insurance	Buyout/LBO [†]		13-Oct-2023	Completed
Altas Partners	Strategic Benefit Resources	Buyout/LBO [†]		09-Jan-2020	Completed
Altas Partners	JAG Insurance Group	Buyout/LBO [†]		05-Apr-2022	Completed
Altas Partners	Ion Insurance	Buyout/LBO [†]		10-May-2021	Completed
Altas Partners	Dwight W. Andrus Insurance (Assets in Louisiana)	Buyout/LBO [†]	\$190.00M	02-Mar-2023	Completed
Altas Partners	W.R. Carey Corporation	Buyout/LBO [†]		08-Nov-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Intercontinental Growth Strategies	Buyout/LBO [†]		08-Aug-2022	Completed
Altas Partners	Sandy Spring Insurance	Buyout/LBO [†]		01-Jun-2022	Completed
Altas Partners	EPG Insurance Agency	Buyout/LBO [†]		01-Oct-2021	Completed
Altas Partners	Winter Harbor Insurance Group	Buyout/LBO [†]		25-Aug-2022	Completed
Altas Partners	Cranbrook Bloomfield Insurance Agency	Buyout/LBO [†]		31-Dec-2019	Completed
Altas Partners	StoneStreet Advisor Group	Buyout/LBO [†]		04-Sep-2019	Completed
Altas Partners	Business Benefits Resource	Buyout/LBO [†]		08-Jun-2023	Completed
Altas Partners	H.W. Hollinger	Buyout/LBO [†]		06-Oct-2021	Completed
Altas Partners	Chun-Ha Insurance Services	Buyout/LBO [†]		04-Apr-2022	Completed
Altas Partners	Elevate Insurance Brokers	Buyout/LBO [†]		01-Sep-2020	Completed
Altas Partners	Shattuck & Grummett Insurance	Buyout/LBO [†]		03-Dec-2021	Completed
Altas Partners	OSA Insurance Brokerage Services	Buyout/LBO [†]		05-Jan-2023	Completed
Altas Partners	LISSC	Buyout/LBO [†]		02-Mar-2017	Completed
Altas Partners	Todd and Associates (Louisiana)	Buyout/LBO [†]		09-Sep-2020	Completed
Altas Partners	DAR The Rocchio Agency	Buyout/LBO [†]		06-Feb-2025	Completed
Altas Partners	Henriott Group	Buyout/LBO [†]		01-Apr-2025	Completed
Altas Partners	Priority Insurance Associates	Buyout/LBO [†]		03-Nov-2022	Completed
Altas Partners	Rider Insurance Group	Buyout/LBO [†]		04-Nov-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Merriwether & Williams Insurance Services	Buyout/LBO [†]		02-May-2024	Completed
Altas Partners	APEX Global Benefit Management System	Buyout/LBO [†]		06-May-2022	Completed
Altas Partners	Hiles-McLeod Insurance	Buyout/LBO [†]		05-Aug-2021	Completed
Altas Partners	McNellis & Company	Buyout/LBO [†]		08-Sep-2021	Completed
Altas Partners	TRG Group Benefits	Buyout/LBO [†]		01-Jan-2019	Completed
Altas Partners	Harris Madden & Powell	Buyout/LBO [†]		10-Mar-2020	Completed
Altas Partners	Woods Insurance Service	Buyout/LBO [†]		31-Dec-2024	Completed
Altas Partners	LSM Insurance	Buyout/LBO [†]		05-Mar-2020	Completed
Altas Partners	First Western Insurance Agency	Buyout/LBO [†]		02-May-2019	Completed
Altas Partners	Western Assurance	Buyout/LBO [†]		04-Mar-2022	Completed
Altas Partners	Usefulideas	Buyout/LBO [†]		02-Jun-2020	Completed
Altas Partners	Verity Insurance Services	Buyout/LBO [†]		08-Oct-2021	Completed
Altas Partners	Eagle American Insurance Agency (Mesa and Denver Operations)	Buyout/LBO [†]		14-Jan-2021	Completed
Altas Partners	RiteHealth Solutions	Buyout/LBO [†]		19-Mar-2019	Completed
Altas Partners	Creative Benefits & Insurance Solutions	Buyout/LBO [†]		11-Jan-2023	Completed
Altas Partners	2837932 Ontario	Buyout/LBO [†]		17-Jul-2024	Completed
Altas Partners	Western Growers Insurance Services	Buyout/LBO [†]		04-Nov-2024	Completed
Altas Partners	Inter-Mountain Retirement Partners	Buyout/LBO [†]		15-Aug-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Dadgar Insurance Agency	Buyout/LBO [†]		12-Dec-2018	Completed
Altas Partners	Kornerstone	Buyout/LBO [†]		02-Feb-2022	Completed
Altas Partners	2197747 Alberta Ltd (Certain Assets in Alberta)	Buyout/LBO [†]		08-May-2024	Completed
Altas Partners	Edbrooke/Stelcner and Associates	Buyout/LBO [†]		17-Jul-2023	Completed
Altas Partners	Chelsea Insurance Agency	Buyout/LBO [†]		08-Dec-2020	Completed
Altas Partners	Global Retirement Partners	Buyout/LBO [†]		04-Sep-2019	Completed
Altas Partners	Insurance Management Company	Buyout/LBO [†]		06-Aug-2024	Completed
Altas Partners	Meyers Glaros	Buyout/LBO [†]		10-Jun-2024	Completed
Altas Partners	Stalco Insurance	Buyout/LBO [†]		04-Nov-2020	Completed
Altas Partners	Conover Insurance	Buyout/LBO [†]		05-May-2021	Completed
Altas Partners	Gibson Deland Insurance (Marine Book of Business)	Buyout/LBO [†]		06-Nov-2019	Completed
Altas Partners	Juban Insurance Group	Buyout/LBO [†]		09-Mar-2021	Completed
Altas Partners	United Shortline Insurance Services	Buyout/LBO [†]		01-Nov-2020	Completed
Altas Partners	Taylor Advisors	Buyout/LBO [†]		02-Mar-2022	Completed
Altas Partners	First Florida Insurance	Buyout/LBO [†]		08-Jul-2021	Completed
Altas Partners	Hub International (Entertainment Book of Business)	Buyout/LBO [†]		10-Mar-2019	Completed
Altas Partners	Nationwide Insurance Company (Property and Casualty Books of Business)	Buyout/LBO [†]		07-Aug-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Morneau Shepell (Benefits Consulting business)	Buyout/LBO [†]	\$70.00M	02-Mar-2020	Completed
Altas Partners	Otter Insurance Agency	Buyout/LBO [†]		11-Dec-2024	Completed
Altas Partners	Cosaint Insurance Partners	Buyout/LBO [†]		10-Jul-2019	Completed
Altas Partners	Perennial Pension & Wealth	Buyout/LBO [†]		15-Aug-2019	Completed
Altas Partners	G.P. Barich Insurance Agency	Buyout/LBO [†]		13-Dec-2018	Completed
Altas Partners	Benefit Strategies Agency	Buyout/LBO [†]		04-Mar-2021	Completed
Altas Partners	Peel & Holland	Buyout/LBO [†]		10-Apr-2022	Completed
Altas Partners	Custom Results Corporate Consulting	Buyout/LBO [†]		08-Jun-2023	Completed
Altas Partners	The B&G Group	Buyout/LBO [†]		01-May-2020	Completed
Altas Partners	Drayton Valley Insurance Agency	Buyout/LBO [†]		06-Mar-2025	Completed
Altas Partners	PDF Financial	Buyout/LBO [†]		08-Oct-2019	Completed
Altas Partners	National Home Warranty Group	Buyout/LBO [†]		04-Oct-2021	Completed
Altas Partners	Integrated Benefits Group Insurance Brokerage	Buyout/LBO [†]		12-Jul-2024	Completed
Altas Partners	Hometown Insurance Brokers	Buyout/LBO [†]		11-Sep-2018	Completed
Altas Partners	Safe Harbor Group	Buyout/LBO [†]		12-Oct-2021	Completed
Altas Partners	Plan Sponsor Consultants	Buyout/LBO [†]		02-Apr-2021	Completed
Altas Partners	JP Griffin Group	Buyout/LBO [†]		15-Dec-2021	Completed
Altas Partners	Porchlight Financial	Buyout/LBO [†]		06-Jun-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Byrnes Agency Insurance	Buyout/LBO [†]		09-Jan-2025	Completed
Altas Partners	Employee Benefit Associates	Buyout/LBO [†]		08-Apr-2025	Completed
Altas Partners	Physicians Risk Associates Insurance Agency	Buyout/LBO [†]		07-Jun-2022	Completed
Altas Partners	ProCorp Financial	Buyout/LBO [†]		04-Oct-2019	Completed
Altas Partners	Kokkoris Insurance Services	Buyout/LBO [†]		23-Jan-2020	Completed
Altas Partners	Hub International (Motorsports Book Of Business)	Buyout/LBO [†]		06-Feb-2019	Completed
Altas Partners	Miv Insurance	Buyout/LBO [†]		05-Mar-2025	Completed
Altas Partners	Jordan Sibling (Retirement and Private Wealth Books of Business)	Buyout/LBO [†]		07-Mar-2025	Completed
Altas Partners	Disability Book of Business	Buyout/LBO [†]		16-Aug-2019	Completed
Altas Partners	Joseph Aiello & Associates	Buyout/LBO [†]		08-Jun-2023	Completed
Altas Partners	Cottenie and Gardner	Buyout/LBO [†]		04-Jun-2019	Completed
Altas Partners	Jerry Baird Insurance Agency	Buyout/LBO [†]		11-Oct-2021	Completed
Altas Partners	CSi Advisory Services	Buyout/LBO [†]		06-Jun-2022	Completed
Altas Partners	Healy Benefits	Buyout/LBO [†]		12-May-2020	Completed
Altas Partners	Frinell Risk Advisors	Buyout/LBO [†]		06-Jul-2023	Completed
Altas Partners	Barker Uerlings Insurance	Buyout/LBO [†]		03-Mar-2020	Completed
Altas Partners	Preferred Services Group	Buyout/LBO [†]		06-Mar-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Demarie Insurance Agency	Buyout/LBO [†]		07-May-2025	Completed
Altas Partners	Preferred Benefits Services Agency	Buyout/LBO [†]		12-Jan-2021	Completed
Altas Partners	Skinner & Company	Buyout/LBO [†]		01-Jul-2024	Completed
Altas Partners	Kuhl Insurance	Buyout/LBO [†]		07-Mar-2022	Completed
Altas Partners	Red Rock Financial	Buyout/LBO [†]		10-Apr-2023	Completed
Altas Partners	GRP Financial California	Buyout/LBO [†]		14-Dec-2021	Completed
Altas Partners	Sheridan Road Financial	Buyout/LBO [†]		09-Jan-2019	Completed
Altas Partners	Corey Steinbach Insurance Agency	Buyout/LBO [†]		05-Apr-2019	Completed
Altas Partners	Glacier Insurance of Libby	Buyout/LBO [†]		03-Mar-2023	Completed
Altas Partners	R.K. Gore & Associates	Buyout/LBO [†]		13-Nov-2024	Completed
Altas Partners	Health Insurance Consultants	Buyout/LBO [†]		08-Jun-2023	Completed
Altas Partners	Horizon Insurance	Buyout/LBO [†]		09-Aug-2023	Completed
Altas Partners	Christiansen Insurance Group	Buyout/LBO [†]		11-Jan-2021	Completed
Altas Partners	Kelliher Agencies	Buyout/LBO [†]		06-May-2019	Completed
Altas Partners	CoverWallet (Certain Assets in United States)	Buyout/LBO [†]	\$38.00M	30-Sep-2023	Completed
Altas Partners	Commercial Line Book of Business (Montana)	Buyout/LBO [†]		10-Dec-2019	Completed
Altas Partners	Gregory Benefits & Consulting	Buyout/LBO [†]		08-Dec-2021	Completed
Altas Partners	Tilghman Insurance of Myrtle Beach	Buyout/LBO [†]		08-Sep-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Defranco Insurance	Buyout/LBO [†]		06-Apr-2023	Completed
Altas Partners	Global Credit Risk Management	Buyout/LBO [†]		03-Jun-2021	Completed
Altas Partners	Insureon	Buyout/LBO [†]		01-Mar-2022	Completed
Altas Partners	Desilets Insurance Brokers	Buyout/LBO [†]		07-Mar-2018	Completed
Altas Partners	GJJK	Buyout/LBO [†]		07-Sep-2023	Completed
Altas Partners	Wyatt Insurance Services	Buyout/LBO [†]		10-Jul-2024	Completed
Altas Partners	Hollis Companies	Buyout/LBO [†]		04-Sep-2020	Completed
Altas Partners	Horizon Agency	Buyout/LBO [†]		04-Apr-2023	Completed
Altas Partners	In-Fi	Buyout/LBO [†]		14-Jun-2019	Completed
Altas Partners	Insure All	Buyout/LBO [†]		01-Nov-2020	Completed
Altas Partners	Brady Risk Management	Buyout/LBO [†]		01-Apr-2023	Completed
Altas Partners	Rise People (Employee Benefits Practice)	Buyout/LBO [†]		17-Dec-2018	Completed
Altas Partners	Olson Insurance Agency	Buyout/LBO [†]		01-Nov-2020	Completed
Altas Partners	Ibex Enterprises (Life and Health Assets)	Buyout/LBO [†]		01-Jun-2023	Completed
Altas Partners	Wessex Financial	Buyout/LBO [†]		08-Apr-2021	Completed
Altas Partners	Veripax Wealth Management	Buyout/LBO [†]		09-Jun-2025	Completed
Altas Partners	Capax Management & Insurance Services	Buyout/LBO [†]		31-Dec-2020	Completed
Altas Partners	Great Basin Insurance Eugene	Buyout/LBO [†]		04-Oct-2023	Completed
Altas Partners	Bernstein Insurance	Buyout/LBO [†]		07-Oct-2020	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Cooper & Allison Insurance Agency	Buyout/LBO [†]		04-May-2021	Completed
Altas Partners	Insurance Center of New England	Buyout/LBO [†]		05-Aug-2019	Completed
Altas Partners	Calculated Risk Advisors	Buyout/LBO [†]		01-Nov-2021	Completed
Altas Partners	Marketing Management Associates	Buyout/LBO [†]		08-Apr-2022	Completed
Altas Partners	Wade Associates	Buyout/LBO [†]		22-Jul-2024	Completed
Altas Partners	Briargate Insurance Services	Buyout/LBO [†]		08-Jan-2020	Completed
Altas Partners	Wycoff Insurance Agency	Buyout/LBO [†]		05-Jun-2025	Completed
Altas Partners	M.B.I. Group	Buyout/LBO [†]		04-Mar-2019	Completed
Altas Partners	The Wooditch Company	Buyout/LBO [†]		02-May-2023	Completed
Altas Partners	LBA Insurance Services	Buyout/LBO [†]		07-Oct-2019	Completed
Altas Partners	William Peragine III and John Biondo (brokerage services and investment advisory book of business)	Buyout/LBO [†]		17-Oct-2019	Completed
Altas Partners	Clark 401k Consulting	Buyout/LBO [†]		08-Aug-2024	Completed
Altas Partners	EnterMedicare	Buyout/LBO [†]		08-Jun-2021	Completed
Altas Partners	Beacon Hill Wealth Services (Retirement and Private Wealth Book of Business)	Buyout/LBO [†]		07-Jun-2021	Completed
Altas Partners	Barrett & Associates (Indiana)	Buyout/LBO [†]		31-Dec-2019	Completed
Altas Partners	Pollock Insurance	Buyout/LBO [†]		04-Apr-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Associated Insurance Group (Missouri)	Buyout/LBO [†]		08-Oct-2024	Completed
Altas Partners	Wellspring Insurance Agency	Buyout/LBO [†]		02-Mar-2021	Completed
Altas Partners	E-Insure Services	Buyout/LBO [†]		07-Jun-2023	Completed
Altas Partners	Mumby Insurance (Property and Casualty and Employee Benefits Businesses)	Buyout/LBO [†]		08-Oct-2020	Completed
Altas Partners	Allegiant Global Partners	Buyout/LBO [†]		05-May-2025	Completed
Altas Partners	Stop Loss Insurance Brokers	Buyout/LBO [†]		27-Jul-2022	Completed
Altas Partners	Invensure Insurance Brokers	Buyout/LBO [†]		01-Dec-2022	Completed
Altas Partners	Peak Financial Group (Texas)	Buyout/LBO [†]		07-Mar-2019	Completed
Altas Partners	BenefitLink Resource Group	Buyout/LBO [†]		02-Jul-2019	Completed
Altas Partners	Stevens Dell and Associates	Buyout/LBO [†]		07-Nov-2019	Completed
Altas Partners	WhartonHill Advisors	Buyout/LBO [†]		15-Aug-2019	Completed
Altas Partners	HUB Ontario	Buyout/LBO [†]		12-Feb-2019	Completed
Altas Partners	Risk Point Consulting	Buyout/LBO [†]		16-Jul-2021	Completed
Altas Partners	Rhc Insurance Brokers	Buyout/LBO [†]		07-Jan-2020	Completed
Altas Partners	Foster & Parker Insurance	Buyout/LBO [†]		17-Jun-2019	Completed
Altas Partners	Resource Insurance Services	Buyout/LBO [†]		03-May-2019	Completed
Altas Partners	Catto & Catto	Buyout/LBO [†]		02-Dec-2021	Completed
Altas Partners	Kelly King Insurance Services	Buyout/LBO [†]		02-May-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Fifth Avenue Agency	Buyout/LBO [†]		16-May-2025	Completed
Altas Partners	Great North Insurance Services	Buyout/LBO [†]		05-May-2022	Completed
Altas Partners	Shepard Walton King Insurance	Buyout/LBO [†]		07-Dec-2021	Completed
Altas Partners	WestStar Insurance	Buyout/LBO [†]		09-Oct-2024	Completed
Altas Partners	Williford Insurance Group	Buyout/LBO [†]		04-May-2022	Completed
Altas Partners	Flexible Benefits Plans	Buyout/LBO [†]		05-Sep-2024	Completed
Altas Partners	Rogersworks	Buyout/LBO [†]		18-Oct-2021	Completed
Altas Partners	F.A.R.E. Healthcare	Buyout/LBO [†]		06-Sep-2023	Completed
Altas Partners	Ivari (MGA business)	Buyout/LBO [†]		02-Jul-2020	Completed
Altas Partners	RIMS Insurance Brokerage Corporation	Buyout/LBO [†]		08-May-2019	Completed
Altas Partners	Grace & Porta Benefits	Buyout/LBO [†]		27-Jul-2022	Completed
Altas Partners	Baystate Fiduciary Advisors	Buyout/LBO [†]		11-Nov-2020	Completed
Altas Partners	Weiss-Schantz Agency	Buyout/LBO [†]		13-Apr-2023	Completed
Altas Partners	True North Group Insurance Services	Buyout/LBO [†]		07-May-2024	Completed
Altas Partners	KC Insurance Group	Buyout/LBO [†]		05-Apr-2021	Completed
Altas Partners	Newsura Insurance Services (Associated Property and Casualty Lines)	Buyout/LBO [†]		05-Nov-2019	Completed
Altas Partners	Chatham Insurance Partners	Buyout/LBO [†]		14-Dec-2022	Completed
Altas Partners	Clarity Benefits Group	Buyout/LBO [†]		07-May-2019	Completed
Altas Partners	Larry Dean Massey	Buyout/LBO [†]		12-Nov-2020	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	HUB Retirement and Wealth Management	Buyout/LBO [†]		04-Sep-2019	Completed
Altas Partners	RBI Advisory Group	Buyout/LBO [†]		04-Nov-2019	Completed
Altas Partners	KT&D	Buyout/LBO [†]		05-Aug-2022	Completed
Altas Partners	Hanson Insurance Group	Buyout/LBO [†]		03-May-2022	Completed
Altas Partners	Commercial Insurance Brokers	Buyout/LBO [†]		31-Dec-2020	Completed
Altas Partners	Trusted Capital Group	Buyout/LBO [†]		01-Jul-2021	Completed
Altas Partners	Dissinger Reed	Buyout/LBO [†]		16-Aug-2021	Completed
Altas Partners	Jackson Hole Insurance	Buyout/LBO [†]		12-Dec-2024	Completed
Altas Partners	Assured Risk Advisors	Buyout/LBO [†]		03-Aug-2023	Completed
Altas Partners	EVO Insurance Services	Buyout/LBO [†]		12-Apr-2022	Completed
Altas Partners	The Clements Agency	Buyout/LBO [†]		08-Jun-2020	Completed
Altas Partners	Tri Line Agencies	Buyout/LBO [†]		07-Nov-2018	Completed
Altas Partners	Sale Insurance Agency	Buyout/LBO [†]		03-Apr-2024	Completed
Altas Partners	Charles R. Butler	Buyout/LBO [†]		08-Sep-2020	Completed
Altas Partners	Triester, Rossman and Associates	Buyout/LBO [†]		06-Feb-2020	Completed
Altas Partners	Wyoming Financial Insurance	Buyout/LBO [†]		07-Apr-2021	Completed
Altas Partners	Yavitz Insurance Group	Buyout/LBO [†]		10-Feb-2025	Completed
Altas Partners	Clearpoint Advisory Group	Buyout/LBO [†]		05-Oct-2020	Completed
Altas Partners	Berk Bilgen Insurance	Buyout/LBO [†]		03-Jul-2019	Completed
Altas Partners	Forum Risques et Assurance	Buyout/LBO [†]		09-Jan-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Johnston Lewis Associates	Buyout/LBO [†]		08-Jun-2023	Completed
Altas Partners	Dansig	Buyout/LBO [†]		01-Mar-2025	Completed
Altas Partners	MPE Employee Benefit Services	Buyout/LBO [†]		18-Jan-2021	Completed
Altas Partners	Tanna Insurance	Buyout/LBO [†]		01-Nov-2021	Completed
Altas Partners	The Insurance Exchange (Insurance Brokers)	Buyout/LBO [†]		11-Mar-2019	Completed
Altas Partners	Symphony Financial & Insurance Services	Buyout/LBO [†]		06-Jun-2024	Completed
Altas Partners	Western Growers Insurance Services (Retail Insurance Brokerage Business)	Buyout/LBO [†]		04-Nov-2024	Completed
Altas Partners	Mayfield Insurance	Buyout/LBO [†]		07-Feb-2025	Completed
Altas Partners	Golden Ears Insurance Services	Buyout/LBO [†]		02-Aug-2023	Completed
Altas Partners	The Crichton Group	Buyout/LBO [†]		09-Jul-2019	Completed
Altas Partners	Bridgecreek Investment Management	Buyout/LBO [†]		10-Nov-2022	Completed
Altas Partners	Asset Protection Group (Midlothian)	Buyout/LBO [†]		16-Oct-2023	Completed
Altas Partners	Wealthplan Advisors	Buyout/LBO [†]		03-Aug-2022	Completed
Altas Partners	Shinstrom & Norman	Buyout/LBO [†]		10-Aug-2023	Completed
Altas Partners	EPIC Retirement Services Consulting	Buyout/LBO [†]		15-Aug-2019	Completed
Altas Partners	Golden Corner Wealth Advisors	Buyout/LBO [†]		07-Jul-2023	Completed
Altas Partners	Salvatore Insurance Brokers	Buyout/LBO [†]		04-Jun-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Fortenberry McNamara	Buyout/LBO [†]		01-Feb-2019	Completed
Altas Partners	Advisory Businesses Of Quintes	Buyout/LBO [†]		06-Oct-2022	Completed
Altas Partners	Lindenwood Agency	Buyout/LBO [†]		05-Feb-2025	Completed
Altas Partners	Bubrig Insurance Agency	Buyout/LBO [†]		04-Aug-2022	Completed
Altas Partners	Hobson Insurance	Buyout/LBO [†]		05-Apr-2023	Completed
Altas Partners	Incentive Systems	Buyout/LBO [†]		05-Mar-2021	Completed
Altas Partners	Phil Bailey & Associates	Buyout/LBO [†]		04-Sep-2019	Completed
Altas Partners	Fiducia Group	Buyout/LBO [†]		01-Dec-2021	Completed
Altas Partners	Nolen Associates	Buyout/LBO [†]		11-Dec-2018	Completed
Altas Partners	Gold Sky Benefits	Buyout/LBO [†]		09-Dec-2021	Completed
Altas Partners	Gus Bates Insurance & Investments	Buyout/LBO [†]		06-Jul-2020	Completed
Altas Partners	Azur Consulting Services	Buyout/LBO [†]		10-Feb-2020	Completed
Altas Partners	Felton et Associes Assurances	Buyout/LBO [†]		09-Sep-2024	Completed
Altas Partners	Prestige Wealth Partners (Florida)	Buyout/LBO [†]		08-May-2025	Completed
Altas Partners	Meyer & Rosenbaum	Buyout/LBO [†]		07-Apr-2025	Completed
Altas Partners	Pete Webb Agency	Buyout/LBO [†]		09-Jul-2021	Completed
Altas Partners	Integrated Risk Solutions	Buyout/LBO [†]		14-Feb-2019	Completed
Altas Partners	401(k) Advisors	Buyout/LBO [†]		06-Apr-2022	Completed
Altas Partners	Fairfield County Bank Insurance Services	Buyout/LBO [†]		01-Dec-2024	Completed
Altas Partners	Hadfield Agency	Buyout/LBO [†]		09-Dec-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Vestas Financial Services	Buyout/LBO [†]		13-May-2020	Completed
Altas Partners	Guide Insurance Services	Buyout/LBO [†]		05-Oct-2022	Completed
Altas Partners	AM Insurance Services of Miami	Buyout/LBO [†]		08-Dec-2022	Completed
Altas Partners	Scott Held Insurance Agency	Buyout/LBO [†]		04-Jun-2025	Completed
Altas Partners	The Spofford Group	Buyout/LBO [†]		17-Dec-2021	Completed
Altas Partners	Gonzalez & Goenaga	Buyout/LBO [†]		12-Apr-2016	Completed
Altas Partners	Combined HCM	Buyout/LBO [†]		05-Jun-2024	Completed
Altas Partners	Canadian Hail Agencies	Buyout/LBO [†]		23-Feb-2023	Completed
Altas Partners	Heritage Wealth Management Group	Buyout/LBO [†]		20-Jun-2022	Completed
Altas Partners	Seymour Alper	Buyout/LBO [†]		02-Dec-2020	Completed
Altas Partners	Miniter Group	Buyout/LBO [†]		17-Aug-2022	Completed
Altas Partners	HB Consultants (Calgary)	Buyout/LBO [†]		03-Jun-2020	Completed
Altas Partners	Davis Trachtenberg	Buyout/LBO [†]		08-Mar-2021	Completed
Altas Partners	Benefex Consulting	Buyout/LBO [†]		04-Feb-2020	Completed
Altas Partners	William R. Cargill Insurance Agency	Buyout/LBO [†]		06-May-2024	Completed
Altas Partners	Legacy Planning Partners	Buyout/LBO [†]		29-Jan-2025	Completed
Altas Partners	McClements Insurance Services	Buyout/LBO [†]		19-Jul-2024	Completed
Altas Partners	Regency Advisory Corporation	Buyout/LBO [†]		02-Oct-2019	Completed
Altas Partners	Shaver-Robichaux Agency	Buyout/LBO [†]		08-Jul-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Essex Agency	Buyout/LBO [†]		04-Jun-2024	Completed
Altas Partners	Southern Colorado Insurance Center	Buyout/LBO [†]		07-Aug-2024	Completed
Altas Partners	Fenner & Esler Agency	Buyout/LBO [†]		03-Jun-2025	Completed
Altas Partners	TAS Insurance Services	Buyout/LBO [†]		16-Jul-2024	Completed
Altas Partners	Creative Financial Strategies	Buyout/LBO [†]		07-Oct-2024	Completed
Altas Partners	Finn & Stone	Buyout/LBO [†]		03-Mar-2021	Completed
Altas Partners	Linton and Associates	Buyout/LBO [†]		04-Mar-2020	Completed
Altas Partners	Dale Barton Agency	Buyout/LBO [†]		12-Dec-2022	Completed
Altas Partners	Basi Insurance Services	Buyout/LBO [†]		13-Dec-2021	Completed
Altas Partners	Anco Insurance Managers	Buyout/LBO [†]		11-Nov-2024	Completed
Altas Partners	Vitolo	Buyout/LBO [†]		16-Nov-2020	Completed
Altas Partners	Midland Agency Insurance	Buyout/LBO [†]		11-Mar-2022	Completed
Altas Partners	Premiere Risk Management	Buyout/LBO [†]		03-Apr-2019	Completed
Altas Partners	Del Fisher Insurance	Buyout/LBO [†]		02-Apr-2019	Completed
Altas Partners	Direct Advisors	Buyout/LBO [†]		07-Sep-2022	Completed
Altas Partners	Coast to Coast Insurance Brokers	Buyout/LBO [†]		10-Jan-2023	Completed
Altas Partners	Purselley Associates	Buyout/LBO [†]		20-Sep-2021	Completed
Altas Partners	Great Basin Insurance	Buyout/LBO [†]		17-Dec-2024	Completed
Altas Partners	IBG Financial Partners	Buyout/LBO [†]		01-Apr-2021	Completed
Altas Partners	Compass Insurance Services	Buyout/LBO [†]		07-Jul-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Altas Partners	Alpha Pension Group	Buyout/LBO [†]		31-Dec-2020	Completed
Altas Partners	The Rubin Group	Buyout/LBO [†]		19-Sep-2018	Completed
Altas Partners	HORAN Health	Buyout/LBO [†]		01-Jun-2023	Completed
Altas Partners	Aegis Retirement Group	Buyout/LBO [†]		01-Jul-2021	Completed
Altas Partners	Epstein Financial	Buyout/LBO [†]		02-Jun-2021	Completed
Altas Partners	Ward Insurance	Buyout/LBO [†]		06-Jul-2021	Completed
Altas Partners	Proteus Performance Management	Buyout/LBO [†]		05-Nov-2018	Completed
Altas Partners	Garnett Retirement Group	Buyout/LBO [†]		07-Jan-2021	Completed
Altas Partners	Swanson and Swanson Insurance	Buyout/LBO [†]		15-Jul-2024	Completed
Altas Partners	Cretcher Heartland	Buyout/LBO [†]		06-Aug-2019	Completed
Altas Partners	Lashua Lachance and Poliks Insurance Agency	Buyout/LBO [†]		15-May-2020	Completed
Altas Partners	Shields Insurance Agency	Buyout/LBO [†]		19-Jan-2021	Completed
Altas Partners	Hatchett Insurance	Buyout/LBO [†]		14-May-2020	Completed
Altas Partners	AG Direct Hail Insurance	Buyout/LBO [†]		23-Feb-2023	Completed
Altas Partners	Guru of Insurance	Buyout/LBO [†]		06-May-2025	Completed
Altas Partners	Kilbride & Harris Insurance Services	Buyout/LBO [†]		09-Aug-2019	Completed
Anges Québec	Puzzle Medical Devices	Later Stage VC	\$25.00M	07-Feb-2023	Completed
Aon	Sharebridge Private Equity Consolidated	PE Growth/Expansion		17-Dec-2008	Completed
Applied Systems	IS2 (eTrading Platform)	Buyout/LBO [†]		29-Sep-2016	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Applied Systems	Tarmika	Buyout/LBO [†]		12-Aug-2022	Completed
Applied Systems	Policy Works	Buyout/LBO [†]		15-Oct-2019	Completed
Applied Systems	Risk Handler Software	Buyout/LBO [†]		06-Dec-2022	Completed
Applied Systems	TechCanary	Buyout/LBO [†]		10-Apr-2019	Completed
Applied Systems	EvoSure	Buyout/LBO [†]		01-Sep-2015	Completed
Applied Systems	Planck	Buyout/LBO [†]		23-Jul-2024	Completed
Applied Systems	Semcat	Buyout/LBO [†]		16-Jun-2015	Completed
Applied Systems	Vulcan Solutions (insurtech division)	Buyout/LBO [†]		01-Jan-2017	Completed
Applied Systems	NxTech	Buyout/LBO ^{†*}		07-Jan-2015	Completed
Applied Systems	EZLynx	Buyout/LBO [†]		09-Mar-2021	Completed
Applied Systems	Indio Technologies	Buyout/LBO [†]		05-Dec-2019	Completed
Applied Systems	Relay Software	Buyout/LBO [†]		29-Jul-2016	Completed
Applied Systems	Cytora	Buyout/LBO [†]		09-Sep-2025	Completed
Apteekkien Eläkekassa	Regina Maria	Buyout/LBO [†]	\$1.10B	01-Apr-2025	Completed
Apteekkien Eläkekassa	MediGroup	Buyout/LBO [†]		01-Apr-2025	Announced/In Progress
Apteekkien Eläkekassa	9Lives Kotipalvelut	Buyout/LBO [†]		29-May-2025	Completed
AQC Capital	Puzzle Medical Devices	Later Stage VC	\$25.00M	07-Feb-2023	Completed
Ardian	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed
Ardian	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
Ardian	Radio & Records	Buyout/LBO [†]		01-Aug-2006	Completed
Ardian	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed
Ardian	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Ardian	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
Ares Management	Klaus	Buyout/LBO [†]		12-Feb-2024	Completed
Ares Management	Ultimate (Automation/Workflow Software)	Buyout/LBO [†]		13-Mar-2024	Completed
Ares Management	The Nielsen Company (Marketing Mix Modeling Business Division)	Buyout/LBO [†]		31-Dec-2024	Completed
Ares Management	Athenahealth	Buyout/LBO	\$17.00B	26-Nov-2021	Completed
Ares Management	Shiftboard	Buyout/LBO [†]		30-May-2025	Completed
Ares Management	Tymeshift	Buyout/LBO [†]		22-Jun-2023	Completed
Ares Management	Pure Aesthetics	Buyout/LBO [†]		28-Feb-2025	Completed
Ares Management	Circana	Buyout/LBO		11-Apr-2022	Completed
Ares Management	Golf Datatech	Buyout/LBO [†]		31-Jan-2024	Completed
Astrolabe Ventures	AlterG	Early Stage VC	\$2.33M	23-Jun-2008	Completed
Athenahealth	Pure Aesthetics	Buyout/LBO [†]		28-Feb-2025	Completed
August Capital	Adchemy	Later Stage VC	\$19.00M	01-Jan-2008	Completed
AutoScout24	LeasingMarkt.de	Buyout/LBO [†]		05-Aug-2020	Completed
AutoScout24	Trader	Buyout/LBO [†]	\$2.70B	12-Dec-2024	Completed
AutoScout24	Dürkop (Kassel)	Buyout/LBO [†]		01-Sep-2024	Completed
AutoScout24	Autoproff	Buyout/LBO ^{†*}		28-Mar-2022	Completed
B7	Dustico	Buyout/LBO [†]		05-Aug-2021	Completed
B7	Checkmarx	Buyout/LBO	\$1.15B	16-Mar-2020	Completed
Bain Capital	Poplatek (Espoo)	Buyout/LBO [†]		23-Dec-2019	Completed
Bain Capital	ProSiebenSat.1 Media	Buyout/LBO	\$525.00M	11-Aug-2003	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Bain Capital	eCard	Buyout/LBO [†]	\$73.00M	04-Jan-2019	Completed
Bain Capital	Verisure	Buyout/LBO	\$2.38B	01-Sep-2011	Completed
Bain Capital	Athenahealth	Buyout/LBO	\$17.00B	26-Nov-2021	Completed
Bain Capital	Polskie ePłatności	Buyout/LBO [†]	\$500.00M	14-Oct-2020	Completed
Bain Capital	Patroll International	Buyout/LBO [†]	\$3.50M [£]	22-Apr-2014	Completed
Bain Capital	Pure Aesthetics	Buyout/LBO [†]		28-Feb-2025	Completed
Bain Capital	CCV Schweiz	Buyout/LBO [†]		21-Oct-2020	Completed
Bain Capital	Nets	Buyout/LBO	\$33.07B	13-Feb-2018	Completed
Bain Capital	Przelewy24	Buyout/LBO [†]		02-Aug-2019	Completed
Bain Capital	Poplatek Payments	Buyout/LBO [†]		23-Dec-2019	Completed
Bain Capital	Concardis	Buyout/LBO [†]		07-Jan-2019	Completed
Bain Capital	Nexi	Buyout/LBO	\$2.20B	18-Dec-2015	Completed
Bain Capital Tech Opportunities	Athenahealth	Buyout/LBO	\$17.00B	26-Nov-2021	Completed
Bain Capital Tech Opportunities	Pure Aesthetics	Buyout/LBO [†]		28-Feb-2025	Completed
Bain Capital Ventures	Embanet	Later Stage VC		02-Aug-2007	Completed
Baker Tilly (Chicago)	Hayflich CPAs	Buyout/LBO [†]		27-Feb-2025	Completed
Baker Tilly (Chicago)	CironeFriedberg	Buyout/LBO [†]		11-Feb-2025	Completed
Baker Tilly (Chicago)	Seiler	Buyout/LBO [†]		01-Jul-2024	Completed
Baker Tilly (Chicago)	Hancock Askew & Co.	Buyout/LBO [†]		03-Feb-2025	Completed
Baker Tilly (Chicago)	Alirrium	Buyout/LBO [†]		01-Nov-2024	Completed
Baker Tilly (Chicago)	Sockeye Business Solutions	Buyout/LBO [†]		18-Jun-2025	Announced/In Progress
Baker Tilly (Chicago)	KraftCPAs	Buyout/LBO [†]		26-Jun-2025	Announced/In Progress

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Baker Tilly (Chicago)	Moss Adams	Buyout/LBO [†]	\$7.00B	03-Jun-2025	Completed
Baker Tilly (Chicago)	Invoke Tax Partners	Buyout/LBO [†]		27-Mar-2025	Completed
Baker Tilly (Chicago)	The Quarters Columbia	Buyout/LBO [†]		22-Jan-2025	Completed
Banneker Partners	Interactive Intelligence Group	Buyout/LBO [†]	\$1.40B	01-Dec-2016	Completed
Banneker Partners	Silver Lining Solutions	Buyout/LBO [†]		27-Feb-2017	Completed
Battery Ventures	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
BDC Capital	Puzzle Medical Devices	Later Stage VC	\$25.00M	07-Feb-2023	Completed
Belron	Cristalbox	Buyout/LBO [†]		28-Jan-2022	Completed
Belron	Scheiben-Doktor	Buyout/LBO [†]		06-Sep-2022	Completed
Belron	Autocristal Sevilla	Buyout/LBO [†]		04-May-2022	Completed
Blackbaud	eTapestry.com	Buyout/LBO [†]	\$25.42M	01-Aug-2007	Completed
BlackRock	Radarr	Buyout/LBO [†]		02-Feb-2024	Completed
BlackRock Private Equity Partners	Belron	Secondary Transaction - Private	\$2.69B [£]	17-Dec-2021	Completed
BlackRock Private Equity Partners	Cristalbox	Buyout/LBO [†]		28-Jan-2022	Completed
BlackRock Private Equity Partners	Scheiben-Doktor	Buyout/LBO [†]		06-Sep-2022	Completed
BlackRock Private Equity Partners	Autocristal Sevilla	Buyout/LBO [†]		04-May-2022	Completed
Blackstone	2837932 Ontario	Buyout/LBO [†]		17-Jul-2024	Completed
Blackstone	Medline Industries	Buyout/LBO	\$34.00B	05-Jun-2021	Completed
Blackstone	The Nielsen Company	PE Growth/Expansion	\$10.00B	17-Dec-2007	Completed
Blackstone	Optimum Solutions (Nashville)	Buyout/LBO [†]		02-Oct-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Blackstone	Hadfield Agency	Buyout/LBO [†]		09-Dec-2024	Completed
Blackstone	Fairfield County Bank Insurance Services	Buyout/LBO [†]		01-Dec-2024	Completed
Blackstone	Dansig	Buyout/LBO [†]		01-Mar-2025	Completed
Blackstone	SpotCues	Buyout/LBO [†]		01-Jan-2022	Completed
Blackstone	AG Cuffill	Buyout/LBO [†]		07-Mar-2024	Completed
Blackstone	Immedis	Buyout/LBO [†]	\$550.00M	01-Jul-2023	Completed
Blackstone	Clark 401k Consulting	Buyout/LBO [†]		08-Aug-2024	Completed
Blackstone	Combined HCM	Buyout/LBO [†]		05-Jun-2024	Completed
Blackstone	Drayton Valley Insurance Agency	Buyout/LBO [†]		06-Mar-2025	Completed
Blackstone	Affinnova	Buyout/LBO [†]		29-Oct-2014	Completed
Blackstone	Byrnes Agency Insurance	Buyout/LBO [†]		09-Jan-2025	Completed
Blackstone	Asset Protection Group (Midlothian)	Buyout/LBO [†]		16-Oct-2023	Completed
Blackstone	Shiftboard	Buyout/LBO [†]		30-May-2025	Completed
Blackstone	Ecolab (Global Surgical Solutions)	Buyout/LBO [†]	\$950.00M	01-Aug-2024	Completed
Blackstone	William R. Cargill Insurance Agency	Buyout/LBO [†]		06-May-2024	Completed
Blackstone	Meyer & Rosenbaum	Buyout/LBO [†]		07-Apr-2025	Completed
Blackstone	Legacy Planning Partners	Buyout/LBO [†]		29-Jan-2025	Completed
Blackstone	Lindenwood Agency	Buyout/LBO [†]		05-Feb-2025	Completed
Blackstone	Scott Held Insurance Agency	Buyout/LBO [†]		04-Jun-2025	Completed
Blackstone	McClements Insurance Services	Buyout/LBO [†]		19-Jul-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Blackstone	Symphony Financial & Insurance Services	Buyout/LBO [†]		06-Jun-2024	Completed
Blackstone	Global Ag Risk Solutions	Buyout/LBO [†]		05-Nov-2024	Completed
Blackstone	Quorbit	Buyout/LBO [†]		03-Nov-2022	Completed
Blackstone	Essex Agency	Buyout/LBO [†]		04-Jun-2024	Completed
Blackstone	Miv Insurance	Buyout/LBO [†]		05-Mar-2025	Completed
Blackstone	Southern Colorado Insurance Center	Buyout/LBO [†]		07-Aug-2024	Completed
Blackstone	Associated Insurance Group (Missouri)	Buyout/LBO [†]		08-Oct-2024	Completed
Blackstone	Creative Financial Strategies	Buyout/LBO [†]		07-Oct-2024	Completed
Blackstone	Jordan Sibling (Retirement and Private Wealth Books of Business)	Buyout/LBO [†]		07-Mar-2025	Completed
Blackstone	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
Blackstone	Anco Insurance Managers	Buyout/LBO [†]		11-Nov-2024	Completed
Blackstone	Allegiant Global Partners	Buyout/LBO [†]		05-May-2025	Completed
Blackstone	Medisiss	Buyout/LBO [†]		01-Jan-2012	Completed
Blackstone	PrefConnect	Buyout/LBO [†]		21-Sep-2023	Completed
Blackstone	Time Link International	Buyout/LBO [†]		20-Aug-2013	Completed
Blackstone	Nielsen IAG	Buyout/LBO [†]	\$223.00M	16-May-2008	Completed
Blackstone	Fenner & Esler Agency	Buyout/LBO [†]		03-Jun-2025	Completed
Blackstone	Employee Benefit Associates	Buyout/LBO [†]		08-Apr-2025	Completed
Blackstone	Great Basin Insurance	Buyout/LBO [†]		17-Dec-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Blackstone	GlanceGuide	Buyout/LBO [†]		04-May-2010	Completed
Blackstone	Altegra Health	Buyout/LBO [†]	\$910.00M	13-Aug-2015	Completed
Blackstone	Ascentis	Buyout/LBO [†]		09-Mar-2022	Completed
Blackstone	EverythingBenefits	Buyout/LBO [†]		01-Jun-2021	Completed
Blackstone	Empower Software Solutions	Buyout/LBO [†]		14-Jan-2016	Completed
Blackstone	Preferred Services Group	Buyout/LBO [†]		06-Mar-2024	Completed
Blackstone	Sale Insurance Agency	Buyout/LBO [†]		03-Apr-2024	Completed
Blackstone	Demarie Insurance Agency	Buyout/LBO [†]		07-May-2025	Completed
Blackstone	Financial Management Solutions	Buyout/LBO [†]		05-Jan-2017	Completed
Blackstone	Great Place to Work Institute	Buyout/LBO [†]		01-Sep-2021	Completed
Blackstone	Swanson and Swanson Insurance	Buyout/LBO [†]		15-Jul-2024	Completed
Blackstone	Western Growers Insurance Services (Retail Insurance Brokerage Business)	Buyout/LBO [†]		04-Nov-2024	Completed
Blackstone	Stat Health Care	Buyout/LBO [†]		11-Jan-2023	Completed
Blackstone	Skinner & Company	Buyout/LBO [†]		01-Jul-2024	Completed
Blackstone	Scout24	Buyout/LBO	\$2.00B	01-Feb-2014	Completed
Blackstone	Jackson Hole Insurance	Buyout/LBO [†]		12-Dec-2024	Completed
Blackstone	Guru of Insurance	Buyout/LBO [†]		06-May-2025	Completed
Blackstone	Fifth Avenue Agency	Buyout/LBO [†]		16-May-2025	Completed
Blackstone	Kaba Workforce Solutions (AutoTime Business)	Buyout/LBO [†]		18-Sep-2015	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Blackstone	R.K. Gore & Associates	Buyout/LBO [†]		13-Nov-2024	Completed
Blackstone	TAS Insurance Services	Buyout/LBO [†]		16-Jul-2024	Completed
Blackstone	Mayfield Insurance	Buyout/LBO [†]		07-Feb-2025	Completed
Blackstone	KoreanClick	Buyout/LBO [†]		09-Sep-2009	Completed
Blackstone	LivaNova	Buyout/LBO		04-Mar-2021	Failed/Cancelled
Blackstone	CoverWallet (Certain Assets in United States)	Buyout/LBO [†]	\$38.00M	30-Sep-2023	Completed
Blackstone	DAR The Rocchio Agency	Buyout/LBO [†]		06-Feb-2025	Completed
Blackstone	Henriott Group	Buyout/LBO [†]		01-Apr-2025	Completed
Blackstone	Datamatics Management Services	Buyout/LBO [†]		25-Oct-2016	Completed
Blackstone	D'Onofrio Insurance	Buyout/LBO [†]		13-Oct-2023	Completed
Blackstone	Texas Genco	Buyout/LBO	\$3.65B	13-Apr-2005	Completed
Blackstone	Merriwether & Williams Insurance Services	Buyout/LBO [†]		02-May-2024	Completed
Blackstone	Felton et Associes Assurances	Buyout/LBO [†]		09-Sep-2024	Completed
Blackstone	Flexible Benefits Plans	Buyout/LBO [†]		05-Sep-2024	Completed
Blackstone	WestStar Insurance	Buyout/LBO [†]		09-Oct-2024	Completed
Blackstone	Woods Insurance Service	Buyout/LBO [†]		31-Dec-2024	Completed
Blackstone	eRx Network	Buyout/LBO			Completed
Blackstone	vBrand	Buyout/LBO [†]		03-Aug-2017	Completed
Blackstone	AdminiSource Communications	Buyout/LBO [†]	\$35.00M	10-Dec-2014	Completed
Blackstone	Telephia	Buyout/LBO [†]	\$440.00M	10-Aug-2007	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Blackstone	Yavitz Insurance Group	Buyout/LBO [†]		10-Feb-2025	Completed
Blackstone	Western Growers Insurance Services	Buyout/LBO [†]		04-Nov-2024	Completed
Blackstone	Wyatt Insurance Services	Buyout/LBO [†]		10-Jul-2024	Completed
Blackstone	Change Healthcare (Acquired 2014)	Buyout/LBO [†]	\$185.00M	19-Nov-2014	Completed
Blackstone	United Medco	Buyout/LBO [†]		10-Jan-2024	Completed
Blackstone	2197747 Alberta Ltd (Certain Assets in Alberta)	Buyout/LBO [†]		08-May-2024	Completed
Blackstone	Veripax Wealth Management	Buyout/LBO [†]		09-Jun-2025	Completed
Blackstone	Insurance Management Company	Buyout/LBO [†]		06-Aug-2024	Completed
Blackstone	Scout24	Buyout/LBO	\$5.70B [£]	14-May-2019	Failed/Cancelled
Blackstone	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed
Blackstone	Meyers Glaros	Buyout/LBO [†]		10-Jun-2024	Completed
Blackstone	Great Basin Insurance Eugene	Buyout/LBO [†]		04-Oct-2023	Completed
Blackstone	Media Instruments	Buyout/LBO [†]		26-Mar-2010	Completed
Blackstone	TC3 Health	Buyout/LBO [†]	\$61.00M	07-May-2012	Completed
Blackstone	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed
Blackstone	Classmarkets	Buyout/LBO [†]	\$4.17M	08-Sep-2015	Completed
Blackstone	Wade Associates	Buyout/LBO [†]		22-Jul-2024	Completed
Blackstone	True North Group Insurance Services	Buyout/LBO [†]		07-May-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Blackstone	Integrated Benefits Group Insurance Brokerage	Buyout/LBO [†]		12-Jul-2024	Completed
Blackstone	Radio & Records	Buyout/LBO [†]		01-Aug-2006	Completed
Blackstone	Otter Insurance Agency	Buyout/LBO [†]		11-Dec-2024	Completed
Blackstone	USP Market Intelligence	Buyout/LBO [†]		08-Feb-2010	Completed
Blackstone	Wycoff Insurance Agency	Buyout/LBO [†]		05-Jun-2025	Completed
Blackstone	Prestige Wealth Partners (Florida)	Buyout/LBO [†]		08-May-2025	Completed
Blackstone	Interboro Systems Corporation	Buyout/LBO [†]		01-Jan-2022	Completed
Blackstone	Pollock Insurance	Buyout/LBO [†]		04-Apr-2024	Completed
Blackstone	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
Blue Owl Capital	Zendesk	Buyout/LBO	\$10.20B	22-Nov-2022	Completed
Blue Owl Capital	Local Measure International	Buyout/LBO [†]		20-May-2025	Completed
Blue Owl Capital	HyperArc	Buyout/LBO [†]		14-Jun-2025	Completed
Blue Venture Fund	Change Healthcare	Secondary Transaction - Private	\$575.00M	11-Feb-2008	Completed
Blum Capital Partners	Western Wireless	PE Growth/Expansion	\$130.00M	01-Jan-1990	Completed
Boreal Ventures	Puzzle Medical Devices	Later Stage VC	\$25.00M	07-Feb-2023	Completed
Broadview Ventures	Puzzle Medical Devices	Later Stage VC	\$25.00M	07-Feb-2023	Completed
Caisse de dépôt et placement du Québec	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed
Caliber Collision	Smith Brothers Collision Center	Buyout/LBO [†]			Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Caliber Collision	Tatman's Carstar	Buyout/LBO [†]		10-Dec-2021	Completed
Caliber Collision	AutoNation (17 Collision Centers)	Buyout/LBO [†]		12-Oct-2021	Completed
Caliber Collision	Herb's Paint & Body	Buyout/LBO [†]		05-Aug-2019	Completed
Caliber Collision	Auto Body Innovations	Buyout/LBO [†]		19-Oct-2023	Completed
Caliber Collision	Price's Collision Centers	Buyout/LBO [†]		09-Apr-2019	Completed
Caliber Collision	Nagys Collision Centers(10 Locations)	Buyout/LBO [†]		01-Jan-2019	Completed
CapitalG	Muscope	Buyout/LBO [†]		18-Nov-2024	Completed
CapitalG	Renaissance Learning	Buyout/LBO	\$1.10B	11-Apr-2014	Completed
CapitalG	myON	Buyout/LBO [†]		19-Mar-2018	Completed
CapitalG	UClass	Buyout/LBO [†]		19-Feb-2015	Completed
CapitalG	Millesimo	Buyout/LBO [†]		31-Mar-2025	Completed
CapitalG	Risk Handler Software	Buyout/LBO [†]		06-Dec-2022	Completed
CapitalG	Indio Technologies	Buyout/LBO [†]		05-Dec-2019	Completed
CapitalG	Claritev	Buyout/LBO	\$7.50B	01-Jun-2016	Completed
CapitalG	Poker (Italy)	Buyout/LBO [†]		01-Mar-2024	Completed
CapitalG	ClicData	Buyout/LBO [†]		03-Jul-2025	Completed
CapitalG	Tarmika	Buyout/LBO [†]		12-Aug-2022	Completed
CapitalG	Sellsy	Buyout/LBO [†]		24-Sep-2025	Announced/In Progress
CapitalG	Planck	Buyout/LBO [†]		23-Jul-2024	Completed
CapitalG	xstream	Buyout/LBO [†]		18-Sep-2025	Completed
CapitalG	Morning (Tel Aviv)	Buyout/LBO [†]	\$150.00M	22-Dec-2024	Completed
CapitalG	Golden Soft	Buyout/LBO [†]		27-Feb-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
CapitalG	Distrito K	Buyout/LBO [†]		17-Sep-2024	Completed
CapitalG	Clémentine	Buyout/LBO [†]		01-Jul-2024	Completed
CapitalG	EZLynx	Buyout/LBO [†]		09-Mar-2021	Completed
CapitalG	Cytora	Buyout/LBO [†]		09-Sep-2025	Completed
CapitalG	Change Capital	Buyout/LBO [†]		25-Jun-2024	Completed
Carlyle AlInvest	Colton Insurance Associates	Buyout/LBO [†]		06-Jun-2017	Completed
Carlyle AlInvest	Medley/Turrentine & Associates	Buyout/LBO [†]		06-Dec-2016	Completed
Carlyle AlInvest	Kenneth A. Murray Insurance	Buyout/LBO [†]		09-Oct-2017	Completed
Carlyle AlInvest	Del Fisher Insurance	Buyout/LBO [†]		02-Apr-2019	Completed
Carlyle AlInvest	H.W. Hollinger	Buyout/LBO [†]		06-Oct-2021	Completed
Carlyle AlInvest	Marwil & Associates	Buyout/LBO [†]		11-Oct-2017	Completed
Carlyle AlInvest	Columbian Agency	Buyout/LBO [†]		02-Feb-2016	Completed
Carlyle AlInvest	Riviera Insurance Services	Buyout/LBO [†]		01-Nov-2016	Completed
Carlyle AlInvest	Peak Financial Group (Texas)	Buyout/LBO [†]		07-Mar-2019	Completed
Carlyle AlInvest	Insurance Supermarket (certain assets)	Buyout/LBO [†]		07-Apr-2017	Completed
Carlyle AlInvest	Axella Insurance Services	Buyout/LBO [†]		02-Nov-2017	Completed
Carlyle AlInvest	Vestas Financial Services	Buyout/LBO [†]		13-May-2020	Completed
Carlyle AlInvest	Barnett Corporate Insurers	Buyout/LBO [†]		08-May-2018	Completed
Carlyle AlInvest	Patterson Insurance Brokers	Buyout/LBO [†]		07-Sep-2016	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Saffe Property & Casualty (Houston Operations)	Buyout/LBO [†]		05-Apr-2018	Completed
Carlyle AlInvest	Baystate Fiduciary Advisors	Buyout/LBO [†]		11-Nov-2020	Completed
Carlyle AlInvest	Clarity Benefits Group	Buyout/LBO [†]		07-May-2019	Completed
Carlyle AlInvest	KT&D	Buyout/LBO [†]		05-Aug-2022	Completed
Carlyle AlInvest	Employee Benefits Group	Buyout/LBO [†]		05-Nov-2015	Completed
Carlyle AlInvest	Trusted Capital Group	Buyout/LBO [†]		01-Jul-2021	Completed
Carlyle AlInvest	Charles R. Butler	Buyout/LBO [†]		08-Sep-2020	Completed
Carlyle AlInvest	Insurance Management Associates (Annapolis)	Buyout/LBO [†]		02-Nov-2018	Completed
Carlyle AlInvest	The Crichton Group	Buyout/LBO [†]		09-Jul-2019	Completed
Carlyle AlInvest	Pippel Insurance Agency	Buyout/LBO [†]		05-Aug-2015	Completed
Carlyle AlInvest	Salvatore Insurance Brokers	Buyout/LBO [†]		04-Jun-2021	Completed
Carlyle AlInvest	Wells Fargo Insurance (Crop Insurance Broker Business)	Buyout/LBO [†]		09-Nov-2017	Completed
Carlyle AlInvest	Bubrig Insurance Agency	Buyout/LBO [†]		04-Aug-2022	Completed
Carlyle AlInvest	MMZ Associates	Buyout/LBO [†]		02-Jan-2015	Completed
Carlyle AlInvest	Nolen Associates	Buyout/LBO [†]		11-Dec-2018	Completed
Carlyle AlInvest	Niedermeyer Risk Management	Buyout/LBO [†]		09-Mar-2022	Completed
Carlyle AlInvest	Jaimac Risk Management	Buyout/LBO [†]		12-Aug-2022	Completed
Carlyle AlInvest	GMS Insurance	Buyout/LBO [†]		02-Mar-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Guide Insurance Services	Buyout/LBO [†]		05-Oct-2022	Completed
Carlyle AlInvest	Patrice Varin (Certain Assets)	Buyout/LBO [†]		04-Aug-2017	Completed
Carlyle AlInvest	HB Consultants (Calgary)	Buyout/LBO [†]		03-Jun-2020	Completed
Carlyle AlInvest	Surety Services	Buyout/LBO [†]		01-Dec-2017	Completed
Carlyle AlInvest	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
Carlyle AlInvest	Direct Advisors	Buyout/LBO [†]		07-Sep-2022	Completed
Carlyle AlInvest	The Rubin Group	Buyout/LBO [†]		19-Sep-2018	Completed
Carlyle AlInvest	Epstein Financial	Buyout/LBO [†]		02-Jun-2021	Completed
Carlyle AlInvest	Shields Insurance Agency	Buyout/LBO [†]		19-Jan-2021	Completed
Carlyle AlInvest	StoneStreet Advisor Group	Buyout/LBO [†]		04-Sep-2019	Completed
Carlyle AlInvest	Progressive Home Warranty Solutions	Buyout/LBO [†]		31-Mar-2015	Completed
Carlyle AlInvest	OSA Insurance Brokerage Services	Buyout/LBO [†]		05-Jan-2023	Completed
Carlyle AlInvest	Rider Insurance Group	Buyout/LBO [†]		04-Nov-2021	Completed
Carlyle AlInvest	Western Assurance	Buyout/LBO [†]		04-Mar-2022	Completed
Carlyle AlInvest	Easy Truck Insurance	Buyout/LBO [†]		04-May-2018	Completed
Carlyle AlInvest	Eagle American Insurance Agency (Mesa and Denver Operations)	Buyout/LBO [†]		14-Jan-2021	Completed
Carlyle AlInvest	Inter-Mountain Retirement Partners	Buyout/LBO [†]		15-Aug-2019	Completed
Carlyle AlInvest	Chelsea Insurance Agency	Buyout/LBO [†]		08-Dec-2020	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Stalco Insurance	Buyout/LBO [†]		04-Nov-2020	Completed
Carlyle AlInvest	United Shortline Insurance Services	Buyout/LBO [†]		01-Nov-2020	Completed
Carlyle AlInvest	Lovsted-Worthington Insurance	Buyout/LBO [†]		03-Jun-2015	Completed
Carlyle AlInvest	Nationwide Insurance Company (Property and Casualty Books of Business)	Buyout/LBO [†]		07-Aug-2019	Completed
Carlyle AlInvest	Morneau Shepell (Benefits Consulting business)	Buyout/LBO [†]	\$70.00M	02-Mar-2020	Completed
Carlyle AlInvest	Kindersley Insurance	Buyout/LBO [†]		07-Feb-2018	Completed
Carlyle AlInvest	Peel & Holland	Buyout/LBO [†]		10-Apr-2022	Completed
Carlyle AlInvest	PDF Financial	Buyout/LBO [†]		08-Oct-2019	Completed
Carlyle AlInvest	JP Griffin Group	Buyout/LBO [†]		15-Dec-2021	Completed
Carlyle AlInvest	Physicians Risk Associates Insurance Agency	Buyout/LBO [†]		07-Jun-2022	Completed
Carlyle AlInvest	Hub International (Motorsports Book Of Business)	Buyout/LBO [†]		06-Feb-2019	Completed
Carlyle AlInvest	City Insurance Services	Buyout/LBO [†]		01-May-2017	Completed
Carlyle AlInvest	Brady Insurance Planning	Buyout/LBO [†]		07-Jun-2017	Completed
Carlyle AlInvest	GRP Financial California	Buyout/LBO [†]		14-Dec-2021	Completed
Carlyle AlInvest	Signature Insurance Group	Buyout/LBO [†]		02-Apr-2012	Completed
Carlyle AlInvest	Kelliher Agencies	Buyout/LBO [†]		06-May-2019	Completed
Carlyle AlInvest	Henry M. Murray Agency	Buyout/LBO [†]		01-Jun-2017	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Wessex Financial	Buyout/LBO [†]		08-Apr-2021	Completed
Carlyle AlInvest	Capax Management & Insurance Services	Buyout/LBO [†]		31-Dec-2020	Completed
Carlyle AlInvest	Cooper & Allison Insurance Agency	Buyout/LBO [†]		04-May-2021	Completed
Carlyle AlInvest	Norton Insurance Agency	Buyout/LBO [†]		01-Oct-2016	Completed
Carlyle AlInvest	Barrett & Associates (Indiana)	Buyout/LBO [†]		31-Dec-2019	Completed
Carlyle AlInvest	BenefitLink Resource Group	Buyout/LBO [†]		02-Jul-2019	Completed
Carlyle AlInvest	Risk Point Consulting	Buyout/LBO [†]		16-Jul-2021	Completed
Carlyle AlInvest	Mayport Insurance & Realty	Buyout/LBO [†]		05-Oct-2016	Completed
Carlyle AlInvest	RBI Advisory Group	Buyout/LBO [†]		04-Nov-2019	Completed
Carlyle AlInvest	MPE Employee Benefit Services	Buyout/LBO [†]		18-Jan-2021	Completed
Carlyle AlInvest	Fiducia Group	Buyout/LBO [†]		01-Dec-2021	Completed
Carlyle AlInvest	Heritage Wealth Management Group	Buyout/LBO [†]		20-Jun-2022	Completed
Carlyle AlInvest	Ward Insurance	Buyout/LBO [†]		06-Jul-2021	Completed
Carlyle AlInvest	Lashua Lachance and Poliks Insurance Agency	Buyout/LBO [†]		15-May-2020	Completed
Carlyle AlInvest	Elevate Insurance Brokers	Buyout/LBO [†]		01-Sep-2020	Completed
Carlyle AlInvest	Priority Insurance Associates	Buyout/LBO [†]		03-Nov-2022	Completed
Carlyle AlInvest	IPS Advisors	Buyout/LBO [†]		05-Feb-2018	Completed
Carlyle AlInvest	Tevis Insurance Solutions	Buyout/LBO [†]		30-Dec-2016	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Kuhl Insurance	Buyout/LBO [†]		07-Mar-2022	Completed
Carlyle AlInvest	Commercial Line Book of Business (Montana)	Buyout/LBO [†]		10-Dec-2019	Completed
Carlyle AlInvest	East West Insurance Services	Buyout/LBO [†]		03-Aug-2017	Completed
Carlyle AlInvest	EPG Insurance Agency	Buyout/LBO [†]		01-Oct-2021	Completed
Carlyle AlInvest	Unilite Insurance Agency	Buyout/LBO [†]		11-Jul-2017	Completed
Carlyle AlInvest	Shepard Walton King Insurance	Buyout/LBO [†]		07-Dec-2021	Completed
Carlyle AlInvest	Baker and Associates (Alaska)	Buyout/LBO [†]		03-Oct-2017	Completed
Carlyle AlInvest	GlanceGuide	Buyout/LBO [†]		04-May-2010	Completed
Carlyle AlInvest	Insure All	Buyout/LBO [†]		01-Nov-2020	Completed
Carlyle AlInvest	Christiansen Insurance Group	Buyout/LBO [†]		11-Jan-2021	Completed
Carlyle AlInvest	Pinnacle Financial Group	Buyout/LBO [†]		02-Dec-2016	Completed
Carlyle AlInvest	Compass Insurance Services	Buyout/LBO [†]		07-Jul-2022	Completed
Carlyle AlInvest	Group Benefit Specialists	Buyout/LBO [†]		13-Jul-2015	Completed
Carlyle AlInvest	KoreanClick	Buyout/LBO [†]		09-Sep-2009	Completed
Carlyle AlInvest	Graffam Insurance Group	Buyout/LBO [†]		17-Oct-2017	Completed
Carlyle AlInvest	Commercial Insurance Brokers	Buyout/LBO [†]		31-Dec-2020	Completed
Carlyle AlInvest	Benefit Broker Services	Buyout/LBO [†]		07-Aug-2018	Completed
Carlyle AlInvest	Williford Insurance Group	Buyout/LBO [†]		04-May-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	ES3 Advisory	Buyout/LBO [†]		01-Apr-2018	Completed
Carlyle AlInvest	Dissinger Reed	Buyout/LBO [†]		16-Aug-2021	Completed
Carlyle AlInvest	Wealthplan Advisors	Buyout/LBO [†]		03-Aug-2022	Completed
Carlyle AlInvest	SilverStone Group	Buyout/LBO [†]		04-Dec-2019	Completed
Carlyle AlInvest	Johnson & Wood Insurance Services	Buyout/LBO [†]		05-Oct-2015	Completed
Carlyle AlInvest	The Spofford Group	Buyout/LBO [†]		17-Dec-2021	Completed
Carlyle AlInvest	Steve Mariani Insurance	Buyout/LBO [†]		02-Aug-2017	Completed
Carlyle AlInvest	McNellis & Company	Buyout/LBO [†]		08-Sep-2021	Completed
Carlyle AlInvest	Delisle Agencies	Buyout/LBO [†]		13-Sep-2017	Completed
Carlyle AlInvest	Cosmo Insurance Service	Buyout/LBO [†]		05-Jan-2018	Completed
Carlyle AlInvest	Dadgar Insurance Agency	Buyout/LBO [†]		12-Dec-2018	Completed
Carlyle AlInvest	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed
Carlyle AlInvest	Preferred Benefits Services Agency	Buyout/LBO [†]		12-Jan-2021	Completed
Carlyle AlInvest	Insureon	Buyout/LBO [†]		01-Mar-2022	Completed
Carlyle AlInvest	Bernstein Insurance	Buyout/LBO [†]		07-Oct-2020	Completed
Carlyle AlInvest	Briargate Insurance Services	Buyout/LBO [†]		08-Jan-2020	Completed
Carlyle AlInvest	Invensure Insurance Brokers	Buyout/LBO [†]		01-Dec-2022	Completed
Carlyle AlInvest	Scarborough Company Insurance	Buyout/LBO [†]		03-May-2017	Completed
Carlyle AlInvest	Contractor's Services	Buyout/LBO [†]		01-Dec-2017	Completed
Carlyle AlInvest	Colorado Nonprofit Insurance Agency	Buyout/LBO [†]		06-Aug-2015	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Proteus Performance Management	Buyout/LBO [†]		05-Nov-2018	Completed
Carlyle AlInvest	Integro (Canada)	Buyout/LBO [†]		01-Sep-2017	Completed
Carlyle AlInvest	RiteHealth Solutions	Buyout/LBO [†]		19-Mar-2019	Completed
Carlyle AlInvest	Desilets Insurance Brokers	Buyout/LBO [†]		07-Mar-2018	Completed
Carlyle AlInvest	Flather & Perkins	Buyout/LBO [†]		23-May-2018	Completed
Carlyle AlInvest	Fox-Everett	Buyout/LBO [†]		01-Jun-2014	Completed
Carlyle AlInvest	In-Fi	Buyout/LBO [†]		14-Jun-2019	Completed
Carlyle AlInvest	Jamie Campbell Younger (Insurance Book of Business)	Buyout/LBO [†]		03-Nov-2016	Completed
Carlyle AlInvest	Marketing Management Associates	Buyout/LBO [†]		08-Apr-2022	Completed
Carlyle AlInvest	HUB Ontario	Buyout/LBO [†]		12-Feb-2019	Completed
Carlyle AlInvest	Global Credit Risk Management	Buyout/LBO [†]		03-Jun-2021	Completed
Carlyle AlInvest	Hub International (Entertainment Book of Business)	Buyout/LBO [†]		10-Mar-2019	Completed
Carlyle AlInvest	Harmony Insurance	Buyout/LBO [†]		05-Apr-2016	Completed
Carlyle AlInvest	Global Retirement Partners	Buyout/LBO [†]		04-Sep-2019	Completed
Carlyle AlInvest	LSM Insurance	Buyout/LBO [†]		05-Mar-2020	Completed
Carlyle AlInvest	JAG Insurance Group	Buyout/LBO [†]		05-Apr-2022	Completed
Carlyle AlInvest	Fortenberry McNamara	Buyout/LBO [†]		01-Feb-2019	Completed
Carlyle AlInvest	Catto & Catto	Buyout/LBO [†]		02-Dec-2021	Completed
Carlyle AlInvest	Stevens Dell and Associates	Buyout/LBO [†]		07-Nov-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	RFO Enterprises	Buyout/LBO [†]		04-Nov-2015	Completed
Carlyle AlInvest	Summit Financial Insurance Agency	Buyout/LBO [†]		27-Nov-2017	Completed
Carlyle AlInvest	The Right Choice Insurance Agency	Buyout/LBO [†]		03-Jul-2018	Completed
Carlyle AlInvest	Plan Sponsor Consultants	Buyout/LBO [†]		02-Apr-2021	Completed
Carlyle AlInvest	The Nielsen Company	PE Growth/Expansion	\$10.00B	17-Dec-2007	Completed
Carlyle AlInvest	Banco Management (managing general agent business)	Buyout/LBO [†]		12-Sep-2017	Completed
Carlyle AlInvest	Benefit Strategies Agency	Buyout/LBO [†]		04-Mar-2021	Completed
Carlyle AlInvest	First Florida Insurance	Buyout/LBO [†]		08-Jul-2021	Completed
Carlyle AlInvest	Pointbreak Consulting Group	Buyout/LBO [†]		16-Feb-2018	Completed
Carlyle AlInvest	Todd and Associates (Louisiana)	Buyout/LBO [†]		09-Sep-2020	Completed
Carlyle AlInvest	Intercontinental Growth Strategies	Buyout/LBO [†]		08-Aug-2022	Completed
Carlyle AlInvest	Premiere Risk Management	Buyout/LBO [†]		03-Apr-2019	Completed
Carlyle AlInvest	Benefit Advisory Group	Buyout/LBO [†]		18-Sep-2017	Completed
Carlyle AlInvest	Linton and Associates	Buyout/LBO [†]		04-Mar-2020	Completed
Carlyle AlInvest	Miniter Group	Buyout/LBO [†]		17-Aug-2022	Completed
Carlyle AlInvest	N Compass Group	Buyout/LBO [†]		08-Apr-2015	Completed
Carlyle AlInvest	Arrow Insurance Service	Buyout/LBO [†]		02-Sep-2015	Completed
Carlyle AlInvest	W.R. Carey Corporation	Buyout/LBO [†]		08-Nov-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Millennium Advisory Services	Buyout/LBO [†]		27-Aug-2021	Completed
Carlyle AlInvest	Clearwater Insurance	Buyout/LBO [†]		10-Sep-2018	Completed
Carlyle AlInvest	Bridgecreek Investment Management	Buyout/LBO [†]		10-Nov-2022	Completed
Carlyle AlInvest	Rural Alaska Insurance Agency	Buyout/LBO [†]		02-Oct-2017	Completed
Carlyle AlInvest	Claritev	Buyout/LBO	\$7.50B	01-Jun-2016	Completed
Carlyle AlInvest	Great North Insurance Services	Buyout/LBO [†]		05-May-2022	Completed
Carlyle AlInvest	Kelly King Insurance Services	Buyout/LBO [†]		02-May-2018	Completed
Carlyle AlInvest	Resource Insurance Services	Buyout/LBO [†]		03-May-2019	Completed
Carlyle AlInvest	Foster & Parker Insurance	Buyout/LBO [†]		17-Jun-2019	Completed
Carlyle AlInvest	The HDH Group	Buyout/LBO [†]		02-Jul-2015	Completed
Carlyle AlInvest	International Special Risks	Buyout/LBO [†]		26-Nov-2013	Completed
Carlyle AlInvest	HMBD Insurance Services	Buyout/LBO [†]		03-Dec-2019	Completed
Carlyle AlInvest	Executive Risk Management (Illinois)	Buyout/LBO [†]		05-Sep-2017	Completed
Carlyle AlInvest	WhartonHill Advisors	Buyout/LBO [†]		15-Aug-2019	Completed
Carlyle AlInvest	Nielsen IAG	Buyout/LBO [†]	\$223.00M	16-May-2008	Completed
Carlyle AlInvest	Mumby Insurance (Property and Casualty and Employee Benefits Businesses)	Buyout/LBO [†]		08-Oct-2020	Completed
Carlyle AlInvest	Der Manouel Insurance Group	Buyout/LBO [†]		01-Feb-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Wellspring Insurance Agency	Buyout/LBO [†]		02-Mar-2021	Completed
Carlyle AlInvest	Beacon Hill Wealth Services (Retirement and Private Wealth Book of Business)	Buyout/LBO [†]		07-Jun-2021	Completed
Carlyle AlInvest	EnterMedicare	Buyout/LBO [†]		08-Jun-2021	Completed
Carlyle AlInvest	William Peragine III and John Biondo (brokerage services and investment advisory book of business)	Buyout/LBO [†]		17-Oct-2019	Completed
Carlyle AlInvest	LBA Insurance Services	Buyout/LBO [†]		07-Oct-2019	Completed
Carlyle AlInvest	Parq Advisors	Buyout/LBO [†]		18-Jul-2016	Completed
Carlyle AlInvest	M.B.I. Group	Buyout/LBO [†]		04-Mar-2019	Completed
Carlyle AlInvest	Oxford Coverage	Buyout/LBO [†]		12-Oct-2015	Completed
Carlyle AlInvest	USP Market Intelligence	Buyout/LBO [†]		08-Feb-2010	Completed
Carlyle AlInvest	Calculated Risk Advisors	Buyout/LBO [†]		01-Nov-2021	Completed
Carlyle AlInvest	Heritage Corporate Benefits	Buyout/LBO [†]		03-Apr-2017	Completed
Carlyle AlInvest	Framberger Employee Benefits & Insurance Services	Buyout/LBO [†]		12-May-2015	Completed
Carlyle AlInvest	Insurance Center of New England	Buyout/LBO [†]		05-Aug-2019	Completed
Carlyle AlInvest	Cusson & Anderson Financial Services	Buyout/LBO [†]		02-Apr-2014	Completed
Carlyle AlInvest	Olson Insurance Agency	Buyout/LBO [†]		01-Nov-2020	Completed
Carlyle AlInvest	Rise People (Employee Benefits Practice)	Buyout/LBO [†]		17-Dec-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Hub International Ottawa	Buyout/LBO [†]		07-Sep-2018	Completed
Carlyle AlInvest	Hollis Companies	Buyout/LBO [†]		04-Sep-2020	Completed
Carlyle AlInvest	BW Insurance Agency	Buyout/LBO [†]		04-Aug-2015	Completed
Carlyle AlInvest	Tilghman Insurance of Myrtle Beach	Buyout/LBO [†]		08-Sep-2022	Completed
Carlyle AlInvest	Gregory Benefits & Consulting	Buyout/LBO [†]		08-Dec-2021	Completed
Carlyle AlInvest	Mainline Insurance Brokers	Buyout/LBO [†]		04-Jan-2017	Completed
Carlyle AlInvest	Blackstone Insurance, Benefits & Bonding	Buyout/LBO [†]		08-Aug-2018	Completed
Carlyle AlInvest	Glacier Insurance of Libby	Buyout/LBO [†]		03-Mar-2023	Completed
Carlyle AlInvest	Corey Steinbach Insurance Agency	Buyout/LBO [†]		05-Apr-2019	Completed
Carlyle AlInvest	Kuokoa Enterprises	Buyout/LBO [†]		08-Nov-2018	Completed
Carlyle AlInvest	Sheridan Road Financial	Buyout/LBO [†]		09-Jan-2019	Completed
Carlyle AlInvest	Shofner Lynch & Shulse	Buyout/LBO [†]		01-Jun-2015	Completed
Carlyle AlInvest	Barker Uerlings Insurance	Buyout/LBO [†]		03-Mar-2020	Completed
Carlyle AlInvest	Pickett & Associates Insurance Agency	Buyout/LBO [†]		04-Apr-2016	Completed
Carlyle AlInvest	Healy Benefits	Buyout/LBO [†]		12-May-2020	Completed
Carlyle AlInvest	DFM Insurance Agency	Buyout/LBO [†]		09-Nov-2016	Completed
Carlyle AlInvest	Jerry Baird Insurance Agency	Buyout/LBO [†]		11-Oct-2021	Completed
Carlyle AlInvest	Cottenie and Gardner	Buyout/LBO [†]		04-Jun-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Disability Book of Business	Buyout/LBO [†]		16-Aug-2019	Completed
Carlyle AlInvest	Kokkoris Insurance Services	Buyout/LBO [†]		23-Jan-2020	Completed
Carlyle AlInvest	ProCorp Financial	Buyout/LBO [†]		04-Oct-2019	Completed
Carlyle AlInvest	Porchlight Financial	Buyout/LBO [†]		06-Jun-2019	Completed
Carlyle AlInvest	Elkins Jones Insurance Agency	Buyout/LBO [†]		01-Jan-2017	Completed
Carlyle AlInvest	Coordinated Resources Group	Buyout/LBO [†]		09-Aug-2017	Completed
Carlyle AlInvest	Cowan Benefit Services	Buyout/LBO [†]		05-Jan-2016	Completed
Carlyle AlInvest	Leavitt Insurance Services of Southern California	Buyout/LBO [†]		02-Mar-2017	Completed
Carlyle AlInvest	RPG Solutions	Buyout/LBO [†]		18-Jan-2016	Completed
Carlyle AlInvest	First National Administrators	Buyout/LBO [†]		04-Mar-2014	Completed
Carlyle AlInvest	Hometown Insurance Brokers	Buyout/LBO [†]		11-Sep-2018	Completed
Carlyle AlInvest	Independent Financial Concepts Group	Buyout/LBO [†]		10-Jul-2018	Completed
Carlyle AlInvest	National Home Warranty Group	Buyout/LBO [†]		04-Oct-2021	Completed
Carlyle AlInvest	The B&G Group	Buyout/LBO [†]		01-May-2020	Completed
Carlyle AlInvest	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
Carlyle AlInvest	1st Alaska Insurance	Buyout/LBO [†]		02-Jun-2016	Completed
Carlyle AlInvest	G.P. Barich Insurance Agency	Buyout/LBO [†]		13-Dec-2018	Completed
Carlyle AlInvest	Cosaint Insurance Partners	Buyout/LBO [†]		10-Jul-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Radio & Records	Buyout/LBO [†]		01-Aug-2006	Completed
Carlyle AlInvest	Susoreny & Associates	Buyout/LBO [†]		02-Feb-2018	Completed
Carlyle AlInvest	Optimum Group Benefits & Insurance Services	Buyout/LBO [†]		09-Jul-2018	Completed
Carlyle AlInvest	Taylor Advisors	Buyout/LBO [†]		02-Mar-2022	Completed
Carlyle AlInvest	Juban Insurance Group	Buyout/LBO [†]		09-Mar-2021	Completed
Carlyle AlInvest	The TAMRAC Group	Buyout/LBO [†]		01-Nov-2018	Completed
Carlyle AlInvest	Carlton Insurance Brokers	Buyout/LBO [†]		03-May-2018	Completed
Carlyle AlInvest	Carrion Laffitte & Casellas	Buyout/LBO [†]		01-Oct-2012	Completed
Carlyle AlInvest	Daikin Comfort Technologies North America	Buyout/LBO	\$1.81B	13-Feb-2008	Completed
Carlyle AlInvest	Gibson Deland Insurance (Marine Book of Business)	Buyout/LBO [†]		06-Nov-2019	Completed
Carlyle AlInvest	Conover Insurance	Buyout/LBO [†]		05-May-2021	Completed
Carlyle AlInvest	Desert Empire Insurance Services	Buyout/LBO [†]		04-Dec-2017	Completed
Carlyle AlInvest	Kornerstone	Buyout/LBO [†]		02-Feb-2022	Completed
Carlyle AlInvest	Banyan Consulting Group	Buyout/LBO [†]		06-Oct-2017	Completed
Carlyle AlInvest	Creative Benefits & Insurance Solutions	Buyout/LBO [†]		11-Jan-2023	Completed
Carlyle AlInvest	Costello & Sons Insurance	Buyout/LBO [†]		05-Oct-2017	Completed
Carlyle AlInvest	Verity Insurance Services	Buyout/LBO [†]		08-Oct-2021	Completed
Carlyle AlInvest	Laurus Strategies	Buyout/LBO [†]		04-Nov-2014	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	AdminiSource Communications	Buyout/LBO [†]	\$35.00M	10-Dec-2014	Completed
Carlyle AlInvest	Usefulideas	Buyout/LBO [†]		02-Jun-2020	Completed
Carlyle AlInvest	vBrand	Buyout/LBO [†]		03-Aug-2017	Completed
Carlyle AlInvest	Apex Insurance Brokers	Buyout/LBO [†]		14-Dec-2018	Completed
Carlyle AlInvest	Cassco Insurance	Buyout/LBO [†]		06-Mar-2017	Completed
Carlyle AlInvest	Hickey & Associates (Certain Assets)	Buyout/LBO [†]		02-Sep-2016	Completed
Carlyle AlInvest	Bianchi & Associates	Buyout/LBO [†]		04-Aug-2017	Completed
Carlyle AlInvest	Harris Madden & Powell	Buyout/LBO [†]		10-Mar-2020	Completed
Carlyle AlInvest	Hub International	Buyout/LBO	\$4.40B	02-Oct-2013	Completed
Carlyle AlInvest	TRG Group Benefits	Buyout/LBO [†]		01-Jan-2019	Completed
Carlyle AlInvest	APEX Global Benefit Management System	Buyout/LBO [†]		06-May-2022	Completed
Carlyle AlInvest	Gateway Benefits	Buyout/LBO [†]		05-Jul-2016	Completed
Carlyle AlInvest	Leitao Insurance Agency	Buyout/LBO [†]		07-Mar-2018	Completed
Carlyle AlInvest	Shattuck & Grummett Insurance	Buyout/LBO [†]		03-Dec-2021	Completed
Carlyle AlInvest	Chun-Ha Insurance Services	Buyout/LBO [†]		04-Apr-2022	Completed
Carlyle AlInvest	Cranbrook Bloomfield Insurance Agency	Buyout/LBO [†]		31-Dec-2019	Completed
Carlyle AlInvest	Sandy Spring Insurance	Buyout/LBO [†]		01-Jun-2022	Completed
Carlyle AlInvest	Kilbride & Harris Insurance Services	Buyout/LBO [†]		09-Aug-2019	Completed
Carlyle AlInvest	TYG Insurance	Buyout/LBO [†]		06-Mar-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Garnett Retirement Group	Buyout/LBO [†]		07-Jan-2021	Completed
Carlyle AlInvest	Aegis Retirement Group	Buyout/LBO [†]		01-Jul-2021	Completed
Carlyle AlInvest	Wm. W. Hammond Insurance Agency	Buyout/LBO [†]		09-Jul-2018	Completed
Carlyle AlInvest	BCI Group	Buyout/LBO [†]		17-Mar-2017	Completed
Carlyle AlInvest	IBG Financial Partners	Buyout/LBO [†]		01-Apr-2021	Completed
Carlyle AlInvest	Purselley Associates	Buyout/LBO [†]		20-Sep-2021	Completed
Carlyle AlInvest	Coast to Coast Insurance Brokers	Buyout/LBO [†]		10-Jan-2023	Completed
Carlyle AlInvest	Midland Agency Insurance	Buyout/LBO [†]		11-Mar-2022	Completed
Carlyle AlInvest	Vitolo	Buyout/LBO [†]		16-Nov-2020	Completed
Carlyle AlInvest	Basi Insurance Services	Buyout/LBO [†]		13-Dec-2021	Completed
Carlyle AlInvest	Dale Barton Agency	Buyout/LBO [†]		12-Dec-2022	Completed
Carlyle AlInvest	Finn & Stone	Buyout/LBO [†]		03-Mar-2021	Completed
Carlyle AlInvest	The Ward Agency	Buyout/LBO [†]		06-Aug-2018	Completed
Carlyle AlInvest	dElta Benefits	Buyout/LBO [†]		07-May-2018	Completed
Carlyle AlInvest	Sweet & Baker Insurance Brokers	Buyout/LBO [†]		04-Oct-2016	Completed
Carlyle AlInvest	Shaver-Robichaux Agency	Buyout/LBO [†]		08-Jul-2022	Completed
Carlyle AlInvest	Regency Advisory Corporation	Buyout/LBO [†]		02-Oct-2019	Completed
Carlyle AlInvest	Jones Retirement Plan Advisors	Buyout/LBO [†]		16-Oct-2018	Completed
Carlyle AlInvest	Davis Trachtenberg	Buyout/LBO [†]		08-Mar-2021	Completed
Carlyle AlInvest	Seymour Alper	Buyout/LBO [†]		02-Dec-2020	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Affinnova	Buyout/LBO [†]		29-Oct-2014	Completed
Carlyle AlInvest	Pinnacle Insurance Partners (Insurance Agency Business)	Buyout/LBO [†]		03-Jan-2014	Completed
Carlyle AlInvest	AM Insurance Services of Miami	Buyout/LBO [†]		08-Dec-2022	Completed
Carlyle AlInvest	MillsonJames	Buyout/LBO [†]		14-Jul-2017	Completed
Carlyle AlInvest	401(k) Advisors	Buyout/LBO [†]		06-Apr-2022	Completed
Carlyle AlInvest	Integrated Risk Solutions	Buyout/LBO [†]		14-Feb-2019	Completed
Carlyle AlInvest	Pete Webb Agency	Buyout/LBO [†]		09-Jul-2021	Completed
Carlyle AlInvest	Benefit Partners Group (Certain Assets of Libertyville)	Buyout/LBO [†]		10-Dec-2021	Completed
Carlyle AlInvest	Dwight W. Andrus Insurance (Assets in Louisiana)	Buyout/LBO [†]	\$190.00M	02-Mar-2023	Completed
Carlyle AlInvest	Ion Insurance	Buyout/LBO [†]		10-May-2021	Completed
Carlyle AlInvest	Strategic Benefit Resources	Buyout/LBO [†]		09-Jan-2020	Completed
Carlyle AlInvest	Blair Jarcik Insurance	Buyout/LBO [†]		05-Dec-2019	Completed
Carlyle AlInvest	Telephia	Buyout/LBO [†]	\$440.00M	10-Aug-2007	Completed
Carlyle AlInvest	Rhc Insurance Brokers	Buyout/LBO [†]		07-Jan-2020	Completed
Carlyle AlInvest	Azur Consulting Services	Buyout/LBO [†]		10-Feb-2020	Completed
Carlyle AlInvest	Gus Bates Insurance & Investments	Buyout/LBO [†]		06-Jul-2020	Completed
Carlyle AlInvest	Gold Sky Benefits	Buyout/LBO [†]		09-Dec-2021	Completed
Carlyle AlInvest	Incentive Systems	Buyout/LBO [†]		05-Mar-2021	Completed
Carlyle AlInvest	Liberty New Gate	Buyout/LBO [†]		04-Oct-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Advisory Businesses Of Quintes	Buyout/LBO [†]		06-Oct-2022	Completed
Carlyle AlInvest	Doctors Insurance Services of New England	Buyout/LBO [†]		17-Aug-2015	Completed
Carlyle AlInvest	Livermore & Associates Insurance Services	Buyout/LBO [†]		01-Dec-2014	Completed
Carlyle AlInvest	Harmony Insurance (Commercial Lines Insurance)	Buyout/LBO [†]		05-Apr-2016	Completed
Carlyle AlInvest	The Benefits Company	Buyout/LBO [†]		03-Apr-2018	Completed
Carlyle AlInvest	EPIC Retirement Services Consulting	Buyout/LBO [†]		15-Aug-2019	Completed
Carlyle AlInvest	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed
Carlyle AlInvest	FirstBank Insurance Agency (certain assets)	Buyout/LBO [†]		03-Jun-2016	Completed
Carlyle AlInvest	Stellarus Benefits	Buyout/LBO [†]		11-Sep-2017	Completed
Carlyle AlInvest	The Insurance Exchange (Insurance Brokers)	Buyout/LBO [†]		11-Mar-2019	Completed
Carlyle AlInvest	Tanna Insurance	Buyout/LBO [†]		01-Nov-2021	Completed
Carlyle AlInvest	Johnston Lewis Associates	Buyout/LBO [†]		08-Jun-2023	Completed
Carlyle AlInvest	Forum Risques et Assurance	Buyout/LBO [†]		09-Jan-2019	Completed
Carlyle AlInvest	Clearpoint Advisory Group	Buyout/LBO [†]		05-Oct-2020	Completed
Carlyle AlInvest	MDW Insurance	Buyout/LBO [†]		01-Dec-2016	Completed
Carlyle AlInvest	Rogers, Gunter, Vaughn	Buyout/LBO [†]		08-Aug-2017	Completed
Carlyle AlInvest	Wyoming Financial Insurance	Buyout/LBO [†]		07-Apr-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Triester, Rossman and Associates	Buyout/LBO [†]		06-Feb-2020	Completed
Carlyle AlInvest	Tri Line Agencies	Buyout/LBO [†]		07-Nov-2018	Completed
Carlyle AlInvest	The Clements Agency	Buyout/LBO [†]		08-Jun-2020	Completed
Carlyle AlInvest	Hanson Insurance Group	Buyout/LBO [†]		03-May-2022	Completed
Carlyle AlInvest	Larry Dean Massey	Buyout/LBO [†]		12-Nov-2020	Completed
Carlyle AlInvest	Newsura Insurance Services (Associated Property and Casualty Lines)	Buyout/LBO [†]		05-Nov-2019	Completed
Carlyle AlInvest	KC Insurance Group	Buyout/LBO [†]		05-Apr-2021	Completed
Carlyle AlInvest	Media Instruments	Buyout/LBO [†]		26-Mar-2010	Completed
Carlyle AlInvest	Tri-Star Insurance Professionals	Buyout/LBO [†]		03-Mar-2017	Completed
Carlyle AlInvest	Grace & Porta Benefits	Buyout/LBO [†]		27-Jul-2022	Completed
Carlyle AlInvest	Ivari (MGA business)	Buyout/LBO [†]		02-Jul-2020	Completed
Carlyle AlInvest	Rogersworks	Buyout/LBO [†]		18-Oct-2021	Completed
Carlyle AlInvest	Spectra Management	Buyout/LBO [†]		05-Mar-2018	Completed
Carlyle AlInvest	Hatchett Insurance	Buyout/LBO [†]		14-May-2020	Completed
Carlyle AlInvest	Openlink Financial	Buyout/LBO	\$1.03B	12-Sep-2011	Completed
Carlyle AlInvest	Daniel Picard	Buyout/LBO [†]		11-Jan-2018	Completed
Carlyle AlInvest	Safe Harbor Group	Buyout/LBO [†]		12-Oct-2021	Completed
Carlyle AlInvest	CSi Advisory Services	Buyout/LBO [†]		06-Jun-2022	Completed
Carlyle AlInvest	Hiles-McLeod Insurance	Buyout/LBO [†]		05-Aug-2021	Completed
Carlyle AlInvest	Cretcher Heartland	Buyout/LBO [†]		06-Aug-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Carlyle AlInvest	Alpha Pension Group	Buyout/LBO [†]		31-Dec-2020	Completed
Carlyle AlInvest	Phil Bailey & Associates	Buyout/LBO [†]		04-Sep-2019	Completed
Carlyle AlInvest	BK-JET Group	Buyout/LBO [†]		24-Apr-2018	Completed
Carlyle AlInvest	HUB Retirement and Wealth Management	Buyout/LBO [†]		04-Sep-2019	Completed
Carlyle AlInvest	Red Rock Financial	Buyout/LBO [†]		10-Apr-2023	Completed
Carlyle AlInvest	Cypher Systems (Insurance Brokerage Division)	Buyout/LBO [†]		02-Aug-2018	Completed
Carlyle AlInvest	Perennial Pension & Wealth	Buyout/LBO [†]		15-Aug-2019	Completed
Carlyle AlInvest	Harman Real Estate	Buyout/LBO [†]		05-Sep-2018	Completed
Carlyle AlInvest	HSBI Benefits	Buyout/LBO [†]		06-Jul-2016	Completed
Carlyle AlInvest	First Western Insurance Agency	Buyout/LBO [†]		02-May-2019	Completed
Carlyle AlInvest	LISSC	Buyout/LBO [†]		02-Mar-2017	Completed
Carlyle AlInvest	Benefex Consulting	Buyout/LBO [†]		04-Feb-2020	Completed
Carlyle AlInvest	Gonzalez & Goenaga	Buyout/LBO [†]		12-Apr-2016	Completed
Carlyle AlInvest	Raffa Financial Services	Buyout/LBO [†]		06-Jan-2022	Completed
Carlyle AlInvest	Berk Bilgen Insurance	Buyout/LBO [†]		03-Jul-2019	Completed
Carlyle AlInvest	Chatham Insurance Partners	Buyout/LBO [†]		14-Dec-2022	Completed
Carlyle AlInvest	RIMS Insurance Brokerage Corporation	Buyout/LBO [†]		08-May-2019	Completed
Carlyle AlInvest	Galon Insurance Brokers	Buyout/LBO [†]		02-Feb-2021	Completed
Carlyle Global Advisors	LivaNova	Buyout/LBO		04-Mar-2021	Failed/Cancelled
Catalina Marketing (Saint Petersburg)	Collabrys	Buyout/LBO [†]		16-Apr-2010	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Catalina Marketing (Saint Petersburg)	Local Offer Network	Buyout/LBO		10-Oct-2013	Completed
Catalina Marketing (Saint Petersburg)	Modiv Media	Buyout/LBO ^{†*}		30-Apr-2012	Completed
CenterPoint Energy	Texas Genco	Buyout/LBO	\$3.65B	13-Apr-2005	Completed
Centerview Capital	The Nielsen Company	PE Growth/Expansion	\$10.00B	17-Dec-2007	Completed
Centerview Partners	USP Market Intelligence	Buyout/LBO [†]		08-Feb-2010	Completed
Centerview Partners	Media Instruments	Buyout/LBO [†]		26-Mar-2010	Completed
Centerview Partners	The Nielsen Company	PE Growth/Expansion	\$10.00B	17-Dec-2007	Completed
Centerview Partners	Nielsen IAG	Buyout/LBO [†]	\$223.00M	16-May-2008	Completed
Centerview Partners	KoreanClick	Buyout/LBO [†]		09-Sep-2009	Completed
Centerview Partners	GlanceGuide	Buyout/LBO [†]		04-May-2010	Completed
Centerview Partners	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
Cercano Management	Falcon Cable Holdings	Buyout/LBO [†]	\$2.00B	15-Nov-1999	Completed
Change Healthcare	Altegra Health	Buyout/LBO [†]	\$910.00M	13-Aug-2015	Completed
Change Healthcare	The Sentinel Group	Buyout/LBO ^{†*}		05-Jun-2009	Completed
Change Healthcare	EquiClaim	Buyout/LBO [†]	\$41.00M	03-May-2011	Completed
Change Healthcare	Healthcare Technology Management Services	Buyout/LBO ^{†*}	\$25.00M	24-Mar-2010	Completed
Change Healthcare	Change Healthcare (Acquired 2014)	Buyout/LBO [†]	\$185.00M	19-Nov-2014	Completed
Change Healthcare	eRx Network	Buyout/LBO ^{†*}	\$75.00M	01-Jul-2009	Completed
Change Healthcare	AdminiSource Communications	Buyout/LBO [†]	\$35.00M	10-Dec-2014	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Change Healthcare	GE Healthcare Information Technology (patient statement business)	Buyout/LBO [†]		29-Sep-2008	Completed
Change Healthcare	TC3 Health	Buyout/LBO [†]	\$61.00M	07-May-2012	Completed
Charter Communications	Falcon Cable Holdings	Buyout/LBO [†]	\$2.00B	15-Nov-1999	Completed
Checkmarx	Dustico	Buyout/LBO [†]		05-Aug-2021	Completed
Circana	Information Resources	Buyout/LBO [†]	\$8.00B	01-Aug-2022	Completed
Circana	Golf Datatech	Buyout/LBO [†]		31-Jan-2024	Completed
Circana	The Nielsen Company (Marketing Mix Modeling Business Division)	Buyout/LBO [†]		31-Dec-2024	Completed
Clayton, Dubilier & Rice	Belron	Secondary Transaction - Private	\$2.69B [£]	17-Dec-2021	Completed
Clayton, Dubilier & Rice	Cristalbox	Buyout/LBO [†]		28-Jan-2022	Completed
Clayton, Dubilier & Rice	Autocristal Sevilla	Buyout/LBO [†]		04-May-2022	Completed
Clayton, Dubilier & Rice	Scheiben-Doktor	Buyout/LBO [†]		06-Sep-2022	Completed
Clearstone Venture Partners	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
Clessidra Private Equity	Nexi	Buyout/LBO	\$2.20B	18-Dec-2015	Completed
Cohesive Capital Partners	Golf Datatech	Buyout/LBO [†]		31-Jan-2024	Completed
Cohesive Capital Partners	The Nielsen Company (Marketing Mix Modeling Business Division)	Buyout/LBO [†]		31-Dec-2024	Completed
Comcast Ventures	Ignite Reading	Early Stage VC	\$10.00M	17-Jan-2023	Completed
Coral Group	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Cordis	MedAlliance (Drug Delivery)	Buyout/LBO [†]	\$1.14B	01-Jan-2023	Completed
Cordis	Puzzle Medical Devices	Later Stage VC*	\$25.00M	07-Feb-2023	Completed
Corporacion Financiera Alba	ADT México	Buyout/LBO [†]		16-Jun-2025	Announced/In Progress
Corporacion Financiera Alba	Sisqual WFM	Buyout/LBO [†]		04-Mar-2021	Completed
CPP Investments	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
CPP Investments	Shiftboard	Buyout/LBO [†]		30-May-2025	Completed
CPP Investments	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed
CPP Investments	UKG	Buyout/LBO	\$1.80B [£]	13-Jun-2007	Completed
CPP Investments	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed
CPP Investments	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
CPP Investments	Claritev	Buyout/LBO	\$7.50B	01-Jun-2016	Completed
CPP Investments	Immedis	Buyout/LBO [†]	\$550.00M	01-Jul-2023	Completed
Crescent Capital Group	National Retirement Partners	Buyout/LBO [†]	\$25.30M	09-Feb-2011	Completed
Crescent Capital Group	LPL Financial Holdings	Buyout/LBO	\$1.50B	28-Dec-2005	Completed
Crescent Capital Group	Independent Financial Marketing Group	Buyout/LBO [†]	\$25.69M	05-Sep-2007	Completed
Crescent Capital Group	LPL Independent Advisor Services Group	Buyout/LBO [†]	\$120.48M	20-Jun-2007	Completed
Crestview Partners	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed
Crimson Ventures	AdminiSource Communications	Buyout/LBO [†]	\$35.00M	10-Dec-2014	Completed
CRV	Upromise	Early Stage VC	\$55.00M	06-Nov-2000	Completed
Curriculum Associates	Stile	Buyout/LBO [†]		17-Jul-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Curriculum Associates	SoapBox Labs	Buyout/LBO [†]		22-Nov-2023	Completed
CVC Capital Partners	Sharebridge Private Equity Consolidated	PE Growth/Expansion		17-Dec-2008	Completed
CVC Capital Partners	Regina Maria	Buyout/LBO [†]	\$1.10B	01-Apr-2025	Completed
CVC Capital Partners	9Lives Kotipalvelut	Buyout/LBO [†]		29-May-2025	Completed
CVC Capital Partners	MediGroup	Buyout/LBO [†]		01-Apr-2025	Announced/In Progress
D1 Capital Partners	Radarr	Buyout/LBO [†]		02-Feb-2024	Completed
Dallas Opportunity Partners	Smith Brothers Collision Center	Buyout/LBO [†]			Completed
Desjardins Capital	Puzzle Medical Devices	Later Stage VC	\$25.00M	07-Feb-2023	Completed
DoubleClick	Falk eSolutions	Buyout/LBO [†]		23-Mar-2006	Completed
DoubleClick	Tangozebra	Buyout/LBO [†]	\$15.00M	01-Mar-2007	Completed
DoubleClick	DoubleClick Rich Media and Video	Buyout/LBO [†]		28-Jun-2006	Completed
Dragoneer Investment Group	Patient Pattern	Buyout/LBO [†]		13-Mar-2023	Completed
Dragoneer Investment Group	Audacious Inquiry	Buyout/LBO [†]	\$316.70M	16-Mar-2022	Completed
Dragoneer Investment Group	American HealthTech	Buyout/LBO [†]		16-Jan-2024	Completed
Dragoneer Investment Group	Accu Med Technology Solutions	Buyout/LBO [†]		08-Oct-2012	Completed
Dragoneer Investment Group	PointClickCare	Secondary Transaction - Private	\$700.00M ^F	01-Jan-2020	Completed
Draper Fisher Jurvetson Management	Surge Medicine	Early Stage VC	\$8.50M	10-Jun-2007	Completed
Draper Richards Kaplan Foundation	Ignite Reading	Early Stage VC	\$10.00M	17-Jan-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Drexel Burnham Lambert	Mattel	PIPE		01-Jan-1984	Completed
Dutch Expansion Capital	C More Entertainment	PE Growth/Expansion			Completed
East River Ventures	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed
Edelman Financial Engines	Soundmark Wealth Management	Buyout/LBO [†]		13-May-2024	Completed
Edelman Financial Engines	PRW Wealth Management	Buyout/LBO [†]		16-Nov-2023	Completed
Edelman Financial Engines	Align Wealth Management	Buyout/LBO [†]		03-Oct-2023	Completed
Edelman Financial Engines	Cahill Wealth Management	Buyout/LBO [†]		05-May-2025	Completed
Edelman Financial Engines	New England Pension Plan Systems	Buyout/LBO [†]		14-Dec-2023	Completed
Edelman Financial Engines	Herrmann & Cooke Wealth Management	Buyout/LBO [†]		05-Oct-2022	Completed
Ellucian	CampusIT	Buyout/LBO [†]		20-Jan-2014	Completed
Ellucian	Helix Education	Buyout/LBO [†]		13-Apr-2015	Completed
Ellucian	SunGard Higher Education Managed Services	Buyout/LBO ^{†*}	\$1.78B	23-Jan-2012	Completed
Emergence (Financial Services)	Ignite Reading	Early Stage VC	\$10.00M	17-Jan-2023	Completed
Engie	Gaztransport & Technigaz	Secondary Transaction - Private	\$310.00M	06-Mar-2008	Completed
Enlyte Group	Ensera	Buyout/LBO [†]	\$14.00M	24-Sep-2001	Completed
Enlyte Group	Mitchell ClaimIQ	Buyout/LBO [†]		13-Sep-2005	Completed
Enverus	CRCL Solutions	Buyout/LBO [†]		16-Jun-2023	Completed
Enverus	Pearl Street Technologies	Buyout/LBO [†]		01-Feb-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Enverus	BidOut	Buyout/LBO [†]		21-Jun-2024	Completed
EQT	Zooplus (Specialty Retail)	Buyout/LBO	\$3.00B	03-Nov-2021	Completed
Ergo Partners	Nexi	Buyout/LBO	\$2.20B	18-Dec-2015	Completed
Ergo Partners	Pure Aesthetics	Buyout/LBO [†]		28-Feb-2025	Completed
Ergo Partners	Athenahealth	Buyout/LBO	\$17.00B	26-Nov-2021	Completed
Exnetwork Capital	Patient Pattern	Buyout/LBO [†]		13-Mar-2023	Completed
Exnetwork Capital	American HealthTech	Buyout/LBO [†]		16-Jan-2024	Completed
Farallon Capital Management	Getty Images Holdings	Buyout/LBO	\$2.13B	02-Jul-2008	Completed
Farallon Capital Management	Photolibary	Buyout/LBO [†]		03-May-2011	Completed
Farallon Capital Management	PicScout	Buyout/LBO [†]	\$20.00M	27-Apr-2011	Completed
FFL Partners	GeoVera Holdings	Buyout/LBO [*]		02-Nov-2005	Completed
Finback Investment Partners	TAS Insurance Services	Buyout/LBO [†]		16-Jul-2024	Completed
Finback Investment Partners	Dansig	Buyout/LBO [†]		01-Mar-2025	Completed
Finback Investment Partners	DAR The Rocchio Agency	Buyout/LBO [†]		06-Feb-2025	Completed
Finback Investment Partners	2197747 Alberta Ltd (Certain Assets in Alberta)	Buyout/LBO [†]		08-May-2024	Completed
Finback Investment Partners	Merriwether & Williams Insurance Services	Buyout/LBO [†]		02-May-2024	Completed
Finback Investment Partners	Anco Insurance Managers	Buyout/LBO [†]		11-Nov-2024	Completed
Finback Investment Partners	Global Ag Risk Solutions	Buyout/LBO [†]		05-Nov-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Finback Investment Partners	Henriott Group	Buyout/LBO [†]		01-Apr-2025	Completed
Finback Investment Partners	Hadfield Agency	Buyout/LBO [†]		09-Dec-2024	Completed
Finback Investment Partners	Clark 401k Consulting	Buyout/LBO [†]		08-Aug-2024	Completed
Finback Investment Partners	Meyers Glaros	Buyout/LBO [†]		10-Jun-2024	Completed
Finback Investment Partners	Allegiant Global Partners	Buyout/LBO [†]		05-May-2025	Completed
Finback Investment Partners	2837932 Ontario	Buyout/LBO [†]		17-Jul-2024	Completed
Finback Investment Partners	Western Growers Insurance Services (Retail Insurance Brokerage Business)	Buyout/LBO [†]		04-Nov-2024	Completed
Finback Investment Partners	Byrnes Agency Insurance	Buyout/LBO [†]		09-Jan-2025	Completed
Finback Investment Partners	Fifth Avenue Agency	Buyout/LBO [†]		16-May-2025	Completed
Finback Investment Partners	Mayfield Insurance	Buyout/LBO [†]		07-Feb-2025	Completed
Finback Investment Partners	Pollock Insurance	Buyout/LBO [†]		04-Apr-2024	Completed
Finback Investment Partners	Jordan Sibling (Retirement and Private Wealth Books of Business)	Buyout/LBO [†]		07-Mar-2025	Completed
Finback Investment Partners	Drayton Valley Insurance Agency	Buyout/LBO [†]		06-Mar-2025	Completed
Finback Investment Partners	Miv Insurance	Buyout/LBO [†]		05-Mar-2025	Completed
Finback Investment Partners	Combined HCM	Buyout/LBO [†]		05-Jun-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Finback Investment Partners	Asset Protection Group (Midlothian)	Buyout/LBO [†]		16-Oct-2023	Completed
Finback Investment Partners	Wycoff Insurance Agency	Buyout/LBO [†]		05-Jun-2025	Completed
Finback Investment Partners	Integrated Benefits Group Insurance Brokerage	Buyout/LBO [†]		12-Jul-2024	Completed
Finback Investment Partners	Lindenwood Agency	Buyout/LBO [†]		05-Feb-2025	Completed
Finback Investment Partners	Guru of Insurance	Buyout/LBO [†]		06-May-2025	Completed
Finback Investment Partners	Creative Financial Strategies	Buyout/LBO [†]		07-Oct-2024	Completed
Finback Investment Partners	Jackson Hole Insurance	Buyout/LBO [†]		12-Dec-2024	Completed
Finback Investment Partners	Flexible Benefits Plans	Buyout/LBO [†]		05-Sep-2024	Completed
Finback Investment Partners	Southern Colorado Insurance Center	Buyout/LBO [†]		07-Aug-2024	Completed
Finback Investment Partners	Wade Associates	Buyout/LBO [†]		22-Jul-2024	Completed
Finback Investment Partners	Essex Agency	Buyout/LBO [†]		04-Jun-2024	Completed
Finback Investment Partners	McClements Insurance Services	Buyout/LBO [†]		19-Jul-2024	Completed
Finback Investment Partners	R.K. Gore & Associates	Buyout/LBO [†]		13-Nov-2024	Completed
Finback Investment Partners	Woods Insurance Service	Buyout/LBO [†]		31-Dec-2024	Completed
Finback Investment Partners	Demarie Insurance Agency	Buyout/LBO [†]		07-May-2025	Completed
Finback Investment Partners	CoverWallet (Certain Assets in United States)	Buyout/LBO [†]	\$38.00M	30-Sep-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Finback Investment Partners	Associated Insurance Group (Missouri)	Buyout/LBO [†]		08-Oct-2024	Completed
Finback Investment Partners	Fairfield County Bank Insurance Services	Buyout/LBO [†]		01-Dec-2024	Completed
Finback Investment Partners	Sale Insurance Agency	Buyout/LBO [†]		03-Apr-2024	Completed
Finback Investment Partners	Legacy Planning Partners	Buyout/LBO [†]		29-Jan-2025	Completed
Finback Investment Partners	Insurance Management Company	Buyout/LBO [†]		06-Aug-2024	Completed
Finback Investment Partners	William R. Cargill Insurance Agency	Buyout/LBO [†]		06-May-2024	Completed
Finback Investment Partners	Great Basin Insurance Eugene	Buyout/LBO [†]		04-Oct-2023	Completed
Finback Investment Partners	True North Group Insurance Services	Buyout/LBO [†]		07-May-2024	Completed
Finback Investment Partners	Scott Held Insurance Agency	Buyout/LBO [†]		04-Jun-2025	Completed
Finback Investment Partners	Veripax Wealth Management	Buyout/LBO [†]		09-Jun-2025	Completed
Finback Investment Partners	WestStar Insurance	Buyout/LBO [†]		09-Oct-2024	Completed
Finback Investment Partners	Symphony Financial & Insurance Services	Buyout/LBO [†]		06-Jun-2024	Completed
Finback Investment Partners	Great Basin Insurance	Buyout/LBO [†]		17-Dec-2024	Completed
Finback Investment Partners	Swanson and Swanson Insurance	Buyout/LBO [†]		15-Jul-2024	Completed
Finback Investment Partners	Skinner & Company	Buyout/LBO [†]		01-Jul-2024	Completed
Finback Investment Partners	Felton et Associes Assurances	Buyout/LBO [†]		09-Sep-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Finback Investment Partners	Prestige Wealth Partners (Florida)	Buyout/LBO [†]		08-May-2025	Completed
Finback Investment Partners	Preferred Services Group	Buyout/LBO [†]		06-Mar-2024	Completed
Finback Investment Partners	Western Growers Insurance Services	Buyout/LBO [†]		04-Nov-2024	Completed
Finback Investment Partners	Otter Insurance Agency	Buyout/LBO [†]		11-Dec-2024	Completed
Finback Investment Partners	Wyatt Insurance Services	Buyout/LBO [†]		10-Jul-2024	Completed
Finback Investment Partners	Fenner & Esler Agency	Buyout/LBO [†]		03-Jun-2025	Completed
Finback Investment Partners	Yavitz Insurance Group	Buyout/LBO [†]		10-Feb-2025	Completed
Finback Investment Partners	Employee Benefit Associates	Buyout/LBO [†]		08-Apr-2025	Completed
Finback Investment Partners	D'Onofrio Insurance	Buyout/LBO [†]		13-Oct-2023	Completed
Finback Investment Partners	Meyer & Rosenbaum	Buyout/LBO [†]		07-Apr-2025	Completed
Fisher Lynch Capital	Przelewy24	Buyout/LBO [†]		02-Aug-2019	Completed
Fisher Lynch Capital	Concardis	Buyout/LBO [†]		07-Jan-2019	Completed
Fisher Lynch Capital	CCV Schweiz	Buyout/LBO [†]		21-Oct-2020	Completed
Fisher Lynch Capital	Claritev	Buyout/LBO	\$7.50B	01-Jun-2016	Completed
Fisher Lynch Capital	Polskie ePłatności	Buyout/LBO [†]	\$500.00M	14-Oct-2020	Completed
Fisher Lynch Capital	Poplatek Payments	Buyout/LBO [†]		23-Dec-2019	Completed
Fisher Lynch Capital	Poplatek (Espoo)	Buyout/LBO [†]		23-Dec-2019	Completed
Fisher Lynch Capital	Nets	Buyout/LBO	\$33.07B	13-Feb-2018	Completed
Fisher Lynch Capital	eCard	Buyout/LBO [†]	\$73.00M	04-Jan-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Floating Point	Well (Other Healthcare Technology Systems)	Early Stage VC	\$71.90M	17-Dec-2021	Completed
Foundation Capital	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
Francisco Partners	Dustico	Buyout/LBO [†]		05-Aug-2021	Completed
Fremont Group	Sensors Magazine	Buyout/LBO [†]		16-Jul-1999	Completed
Frog & Peach Investors	AlterG	Early Stage VC	\$2.33M	23-Jun-2008	Completed
Funk Ventures	AlterG	Early Stage VC	\$2.33M	23-Jun-2008	Completed
Future Standard (USA)	Catalina Marketing (Saint Petersburg)	PE Growth/Expansion		11-Oct-2013	Completed
GCM Grosvenor	GCM Grosvenor Private Markets	Buyout/LBO [†]	\$200.00M ^F	02-Jan-2014	Completed
GCP Capital Partners	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed
General Atlantic	Healthcare Technology Management Services	Buyout/LBO [†]	\$25.00M	24-Mar-2010	Completed
General Atlantic	Upromise	Early Stage VC	\$55.00M	06-Nov-2000	Completed
General Atlantic	Upromise	Later Stage VC	\$17.00M ^F	23-Mar-2004	Completed
General Atlantic	GE Healthcare Information Technology (patient statement business)	Buyout/LBO [†]		29-Sep-2008	Completed
General Atlantic	The Sentinel Group	Buyout/LBO [†]		05-Jun-2009	Completed
General Atlantic	Sharebridge Private Equity Consolidated	PE Growth/Expansion		17-Dec-2008	Completed
General Atlantic	Change Healthcare	Secondary Transaction - Private	\$575.00M	11-Feb-2008	Completed
General Atlantic	EquiClaim	Buyout/LBO [†]	\$41.00M	03-May-2011	Completed
General Atlantic	Upromise	Later Stage VC	\$12.00M	09-Oct-2002	Completed
General Atlantic	Finamatrix	Buyout/LBO [†]		17-Jan-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
General Atlantic	eRx Network	Buyout/LBO [†]	\$75.00M	01-Jul-2009	Completed
General Catalyst	Upromise	Early Stage VC	\$55.00M	06-Nov-2000	Completed
General Catalyst	Well (Other Healthcare Technology Systems)	Early Stage VC	\$50.93M	17-Mar-2021	Completed
General Catalyst	Well (Other Healthcare Technology Systems)	Early Stage VC	\$71.90M	17-Dec-2021	Completed
General Catalyst	Well (Other Healthcare Technology Systems)	Early Stage VC	\$25.00M	14-Nov-2019	Completed
Genesys	Radarr	Buyout/LBO [†]		02-Feb-2024	Completed
Genesys	Altocloud	Buyout/LBO [†]		27-Feb-2018	Completed
Genesys	Bold360	Buyout/LBO [†]		05-May-2021	Completed
Genesys	Silver Lining Solutions	Buyout/LBO [†]		27-Feb-2017	Completed
Genesys	nGUVU	Buyout/LBO [†]		03-Mar-2020	Completed
Genesys	Pointillist	Buyout/LBO [†]	\$150.00M	01-Dec-2021	Completed
Genesys	Exceed.AI	Buyout/LBO [†]	\$35.00M	01-Dec-2021	Completed
Genesys	Interactive Intelligence Group	Buyout/LBO [†]	\$1.40B	01-Dec-2016	Completed
Genstar Capital	BidOut	Buyout/LBO [†]		21-Jun-2024	Completed
Genstar Capital	Pearl Street Technologies	Buyout/LBO [†]		01-Feb-2025	Completed
Genstar Capital	CRCL Solutions	Buyout/LBO [†]		16-Jun-2023	Completed
Getty Images Holdings	PicScout	Buyout/LBO ^{†*}	\$20.00M	27-Apr-2011	Completed
Getty Images Holdings	Photolibrary	Buyout/LBO ^{†*}		03-May-2011	Completed
GIC Private	Trusted Capital Group	Buyout/LBO [†]		01-Jul-2021	Completed
GIC Private	UKG	Buyout/LBO	\$1.80B [£]	13-Jun-2007	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
GIC Private	Ultimate (Automation/Workflow Software)	Buyout/LBO [†]		13-Mar-2024	Completed
GIC Private	Klaus	Buyout/LBO [†]		12-Feb-2024	Completed
GIC Private	Athenahealth	Buyout/LBO	\$17.00B	26-Nov-2021	Completed
GIC Private	Zendesk	Buyout/LBO	\$10.20B	22-Nov-2022	Completed
GIC Private	Quorbit	Buyout/LBO [†]		03-Nov-2022	Completed
GIC Private	Pharmaceutical Product Development	PE Growth/Expansion		08-May-2017	Completed
GIC Private	Great Place to Work Institute	Buyout/LBO [†]		01-Sep-2021	Completed
GIC Private	Tymeshift	Buyout/LBO [†]		22-Jun-2023	Completed
GIC Private	Nordic Fund Market	Buyout/LBO [†]		14-Nov-2019	Completed
GIC Private	Empower Software Solutions	Buyout/LBO [†]		14-Jan-2016	Completed
GIC Private	CCV Schweiz	Buyout/LBO [†]		21-Oct-2020	Completed
GIC Private	InvestLab	Buyout/LBO [†]		09-Sep-2019	Completed
GIC Private	WhartonHill Advisors	Buyout/LBO [†]		15-Aug-2019	Completed
GIC Private	Fundinfo (Fund Research Business)	Buyout/LBO [†]		08-Oct-2019	Completed
GIC Private	E-Insure Services	Buyout/LBO [†]		07-Jun-2023	Completed
GIC Private	Belron	Secondary Transaction - Private	\$2.69B ^E	17-Dec-2021	Completed
GIC Private	Medline Industries	Buyout/LBO	\$34.00B	05-Jun-2021	Completed
GIC Private	Immedis	Buyout/LBO [†]	\$550.00M	01-Jul-2023	Completed
GIC Private	PrefConnect	Buyout/LBO [†]		21-Sep-2023	Completed
GIC Private	EverythingBenefits	Buyout/LBO [†]		01-Jun-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
GIC Private	Optimum Solutions (Nashville)	Buyout/LBO [†]		02-Oct-2019	Completed
GIC Private	Nets	Buyout/LBO	\$33.07B	13-Feb-2018	Completed
GIC Private	Medisiss	Buyout/LBO [†]		01-Jan-2012	Completed
GIC Private	Custom Results Corporate Consulting	Buyout/LBO [†]		08-Jun-2023	Completed
GIC Private	Scheiben-Doktor	Buyout/LBO [†]		06-Sep-2022	Completed
GIC Private	Progressive Home Warranty Solutions	Buyout/LBO [†]		31-Mar-2015	Completed
GIC Private	Tri-Star Insurance Professionals	Buyout/LBO [†]		03-Mar-2017	Completed
GIC Private	Epstein Financial	Buyout/LBO [†]		02-Jun-2021	Completed
GIC Private	Sisqual WFM	Buyout/LBO [†]		04-Mar-2021	Completed
GIC Private	Hub International	Buyout/LBO	\$4.40B	02-Oct-2013	Completed
GIC Private	AG Cuffill	Buyout/LBO [†]		07-Mar-2024	Completed
GIC Private	Ascentis	Buyout/LBO [†]		09-Mar-2022	Completed
GIC Private	Time Link International	Buyout/LBO [†]		20-Aug-2013	Completed
GIC Private	Great Basin Insurance	Buyout/LBO [†]		17-Dec-2024	Completed
GIC Private	Concardis	Buyout/LBO [†]		07-Jan-2019	Completed
GIC Private	Claritev	Buyout/LBO	\$7.50B	01-Jun-2016	Completed
GIC Private	eCard	Buyout/LBO [†]	\$73.00M	04-Jan-2019	Completed
GIC Private	ADT México	Buyout/LBO [†]		16-Jun-2025	Announced/In Progress
GIC Private	Polskie ePłatności	Buyout/LBO [†]	\$500.00M	14-Oct-2020	Completed
GIC Private	Cristalbox	Buyout/LBO [†]		28-Jan-2022	Completed
GIC Private	Poplatek (Espoo)	Buyout/LBO [†]		23-Dec-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
GIC Private	United Medco	Buyout/LBO [†]		10-Jan-2024	Completed
GIC Private	Pure Aesthetics	Buyout/LBO [†]		28-Feb-2025	Completed
GIC Private	Przelewy24	Buyout/LBO [†]		02-Aug-2019	Completed
GIC Private	Interboro Systems Corporation	Buyout/LBO [†]		01-Jan-2022	Completed
GIC Private	Autocristal Sevilla	Buyout/LBO [†]		04-May-2022	Completed
GIC Private	Allfunds Bank	Buyout/LBO	\$1.80B	21-Nov-2017	Completed
GIC Private	Local Measure International	Buyout/LBO [†]		20-May-2025	Completed
GIC Private	Poplatek Payments	Buyout/LBO [†]		23-Dec-2019	Completed
GIC Private	SpotCues	Buyout/LBO [†]		01-Jan-2022	Completed
GIC Private	Arlo (European Commercial Operations)	Buyout/LBO [†]	\$50.00M	02-Jan-2020	Completed
GIC Private	MillsonJames	Buyout/LBO [†]		14-Jul-2017	Completed
GIC Private	Financial Management Solutions	Buyout/LBO [†]		05-Jan-2017	Completed
GIC Private	Stat Health Care	Buyout/LBO [†]		11-Jan-2023	Completed
GIC Private	Ecolab (Global Surgical Solutions)	Buyout/LBO [†]	\$950.00M	01-Aug-2024	Completed
GIC Private	HyperArc	Buyout/LBO [†]		14-Jun-2025	Completed
GIC Private	Kaba Workforce Solutions (AutoTime Business)	Buyout/LBO [†]		18-Sep-2015	Completed
Glynn Capital	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed
Goldman Sachs Asset Management	Sensors Magazine	Buyout/LBO [†]		16-Jul-1999	Completed
Golub Capital	Local Measure International	Buyout/LBO [†]		20-May-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Golub Capital	Zendesk	Buyout/LBO	\$10.20B	22-Nov-2022	Completed
Golub Capital	HyperArc	Buyout/LBO [†]		14-Jun-2025	Completed
Grant Park Ventures	Puzzle Medical Devices	Later Stage VC	\$25.00M	07-Feb-2023	Completed
Greylock	Tangozebra	Buyout/LBO [†]	\$15.00M	01-Mar-2007	Completed
Greylock	Upromise	Later Stage VC	\$12.00M	09-Oct-2002	Completed
HarbourVest Partners	Blair Jarcik Insurance	Buyout/LBO [†]		05-Dec-2019	Completed
HarbourVest Partners	Strategic Benefit Resources	Buyout/LBO [†]		09-Jan-2020	Completed
HarbourVest Partners	Hub International Ottawa	Buyout/LBO [†]		07-Sep-2018	Completed
HarbourVest Partners	Hollis Companies	Buyout/LBO [†]		04-Sep-2020	Completed
HarbourVest Partners	Spectra Management	Buyout/LBO [†]		05-Mar-2018	Completed
HarbourVest Partners	BW Insurance Agency	Buyout/LBO [†]		04-Aug-2015	Completed
HarbourVest Partners	Ion Insurance	Buyout/LBO [†]		10-May-2021	Completed
HarbourVest Partners	Dwight W. Andrus Insurance (Assets in Louisiana)	Buyout/LBO [†]	\$190.00M	02-Mar-2023	Completed
HarbourVest Partners	Banco Management (managing general agent business)	Buyout/LBO [†]		12-Sep-2017	Completed
HarbourVest Partners	Jaimac Risk Management	Buyout/LBO [†]		12-Aug-2022	Completed
HarbourVest Partners	Benefit Partners Group (Certain Assets of Libertyville)	Buyout/LBO [†]		10-Dec-2021	Completed
HarbourVest Partners	Harmony Insurance	Buyout/LBO [†]		05-Apr-2016	Completed
HarbourVest Partners	Henry M. Murray Agency	Buyout/LBO [†]		01-Jun-2017	Completed
HarbourVest Partners	Phil Bailey & Associates	Buyout/LBO [†]		04-Sep-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Benefit Strategies Agency	Buyout/LBO [†]		04-Mar-2021	Completed
HarbourVest Partners	Tilghman Insurance of Myrtle Beach	Buyout/LBO [†]		08-Sep-2022	Completed
HarbourVest Partners	Pete Webb Agency	Buyout/LBO [†]		09-Jul-2021	Completed
HarbourVest Partners	Gregory Benefits & Consulting	Buyout/LBO [†]		08-Dec-2021	Completed
HarbourVest Partners	Integrated Risk Solutions	Buyout/LBO [†]		14-Feb-2019	Completed
HarbourVest Partners	401(k) Advisors	Buyout/LBO [†]		06-Apr-2022	Completed
HarbourVest Partners	Allfunds Bank	Buyout/LBO	\$1.80B	21-Nov-2017	Completed
HarbourVest Partners	Kelliher Agencies	Buyout/LBO [†]		06-May-2019	Completed
HarbourVest Partners	GMS Insurance	Buyout/LBO [†]		02-Mar-2018	Completed
HarbourVest Partners	Guide Insurance Services	Buyout/LBO [†]		05-Oct-2022	Completed
HarbourVest Partners	MillsonJames	Buyout/LBO [†]		14-Jul-2017	Completed
HarbourVest Partners	Mainline Insurance Brokers	Buyout/LBO [†]		04-Jan-2017	Completed
HarbourVest Partners	AM Insurance Services of Miami	Buyout/LBO [†]		08-Dec-2022	Completed
HarbourVest Partners	Blackstone Insurance, Benefits & Bonding	Buyout/LBO [†]		08-Aug-2018	Completed
HarbourVest Partners	Patrice Varin (Certain Assets)	Buyout/LBO [†]		04-Aug-2017	Completed
HarbourVest Partners	Pinnacle Insurance Partners (Insurance Agency Business)	Buyout/LBO [†]		03-Jan-2014	Completed
HarbourVest Partners	Seymour Alper	Buyout/LBO [†]		02-Dec-2020	Completed
HarbourVest Partners	HB Consultants (Calgary)	Buyout/LBO [†]		03-Jun-2020	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Davis Trachtenberg	Buyout/LBO [†]		08-Mar-2021	Completed
HarbourVest Partners	First Florida Insurance	Buyout/LBO [†]		08-Jul-2021	Completed
HarbourVest Partners	Glacier Insurance of Libby	Buyout/LBO [†]		03-Mar-2023	Completed
HarbourVest Partners	Surety Services	Buyout/LBO [†]		01-Dec-2017	Completed
HarbourVest Partners	Corey Steinbach Insurance Agency	Buyout/LBO [†]		05-Apr-2019	Completed
HarbourVest Partners	Steve Mariani Insurance	Buyout/LBO [†]		02-Aug-2017	Completed
HarbourVest Partners	Disability Book of Business	Buyout/LBO [†]		16-Aug-2019	Completed
HarbourVest Partners	Purselley Associates	Buyout/LBO [†]		20-Sep-2021	Completed
HarbourVest Partners	Todd and Associates (Louisiana)	Buyout/LBO [†]		09-Sep-2020	Completed
HarbourVest Partners	Pinnacle Financial Group	Buyout/LBO [†]		02-Dec-2016	Completed
HarbourVest Partners	Hub International (Motorsports Book Of Business)	Buyout/LBO [†]		06-Feb-2019	Completed
HarbourVest Partners	IBG Financial Partners	Buyout/LBO [†]		01-Apr-2021	Completed
HarbourVest Partners	Compass Insurance Services	Buyout/LBO [†]		07-Jul-2022	Completed
HarbourVest Partners	Elevate Insurance Brokers	Buyout/LBO [†]		01-Sep-2020	Completed
HarbourVest Partners	Kokkoris Insurance Services	Buyout/LBO [†]		23-Jan-2020	Completed
HarbourVest Partners	ProCorp Financial	Buyout/LBO [†]		04-Oct-2019	Completed
HarbourVest Partners	Physicians Risk Associates Insurance Agency	Buyout/LBO [†]		07-Jun-2022	Completed
HarbourVest Partners	BCI Group	Buyout/LBO [†]		17-Mar-2017	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	InvestLab	Buyout/LBO [†]		09-Sep-2019	Completed
HarbourVest Partners	EPG Insurance Agency	Buyout/LBO [†]		01-Oct-2021	Completed
HarbourVest Partners	The Rubin Group	Buyout/LBO [†]		19-Sep-2018	Completed
HarbourVest Partners	Porchlight Financial	Buyout/LBO [†]		06-Jun-2019	Completed
HarbourVest Partners	JP Griffin Group	Buyout/LBO [†]		15-Dec-2021	Completed
HarbourVest Partners	Lashua Lachance and Poliks Insurance Agency	Buyout/LBO [†]		15-May-2020	Completed
HarbourVest Partners	Elkins Jones Insurance Agency	Buyout/LBO [†]		01-Jan-2017	Completed
HarbourVest Partners	Intercontinental Growth Strategies	Buyout/LBO [†]		08-Aug-2022	Completed
HarbourVest Partners	Wm. W. Hammond Insurance Agency	Buyout/LBO [†]		09-Jul-2018	Completed
HarbourVest Partners	Coordinated Resources Group	Buyout/LBO [†]		09-Aug-2017	Completed
HarbourVest Partners	LISSC	Buyout/LBO [†]		02-Mar-2017	Completed
HarbourVest Partners	Cowan Benefit Services	Buyout/LBO [†]		05-Jan-2016	Completed
HarbourVest Partners	Group Benefit Specialists	Buyout/LBO [†]		13-Jul-2015	Completed
HarbourVest Partners	Leavitt Insurance Services of Southern California	Buyout/LBO [†]		02-Mar-2017	Completed
HarbourVest Partners	Shepard Walton King Insurance	Buyout/LBO [†]		07-Dec-2021	Completed
HarbourVest Partners	Aegis Retirement Group	Buyout/LBO [†]		01-Jul-2021	Completed
HarbourVest Partners	RPG Solutions	Buyout/LBO [†]		18-Jan-2016	Completed
HarbourVest Partners	First National Administrators	Buyout/LBO [†]		04-Mar-2014	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Red Rock Financial	Buyout/LBO [†]		10-Apr-2023	Completed
HarbourVest Partners	H.W. Hollinger	Buyout/LBO [†]		06-Oct-2021	Completed
HarbourVest Partners	Epstein Financial	Buyout/LBO [†]		02-Jun-2021	Completed
HarbourVest Partners	Garnett Retirement Group	Buyout/LBO [†]		07-Jan-2021	Completed
HarbourVest Partners	Hometown Insurance Brokers	Buyout/LBO [†]		11-Sep-2018	Completed
HarbourVest Partners	Shields Insurance Agency	Buyout/LBO [†]		19-Jan-2021	Completed
HarbourVest Partners	TYG Insurance	Buyout/LBO [†]		06-Mar-2018	Completed
HarbourVest Partners	Kilbride & Harris Insurance Services	Buyout/LBO [†]		09-Aug-2019	Completed
HarbourVest Partners	The Spofford Group	Buyout/LBO [†]		17-Dec-2021	Completed
HarbourVest Partners	Independent Financial Concepts Group	Buyout/LBO [†]		10-Jul-2018	Completed
HarbourVest Partners	Sandy Spring Insurance	Buyout/LBO [†]		01-Jun-2022	Completed
HarbourVest Partners	National Home Warranty Group	Buyout/LBO [†]		04-Oct-2021	Completed
HarbourVest Partners	PDF Financial	Buyout/LBO [†]		08-Oct-2019	Completed
HarbourVest Partners	Cypher Systems (Insurance Brokerage Division)	Buyout/LBO [†]		02-Aug-2018	Completed
HarbourVest Partners	Saffe Property & Casualty (Houston Operations)	Buyout/LBO [†]		05-Apr-2018	Completed
HarbourVest Partners	First Western Insurance Agency	Buyout/LBO [†]		02-May-2019	Completed
HarbourVest Partners	Johnson & Wood Insurance Services	Buyout/LBO [†]		05-Oct-2015	Completed
HarbourVest Partners	Winter Harbor Insurance Group	Buyout/LBO [†]		25-Aug-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	The B&G Group	Buyout/LBO [†]		01-May-2020	Completed
HarbourVest Partners	Cranbrook Bloomfield Insurance Agency	Buyout/LBO [†]		31-Dec-2019	Completed
HarbourVest Partners	StoneStreet Advisor Group	Buyout/LBO [†]		04-Sep-2019	Completed
HarbourVest Partners	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
HarbourVest Partners	Chun-Ha Insurance Services	Buyout/LBO [†]		04-Apr-2022	Completed
HarbourVest Partners	Peel & Holland	Buyout/LBO [†]		10-Apr-2022	Completed
HarbourVest Partners	Progressive Home Warranty Solutions	Buyout/LBO [†]		31-Mar-2015	Completed
HarbourVest Partners	Ward Insurance	Buyout/LBO [†]		06-Jul-2021	Completed
HarbourVest Partners	1st Alaska Insurance	Buyout/LBO [†]		02-Jun-2016	Completed
HarbourVest Partners	Shattuck & Grummett Insurance	Buyout/LBO [†]		03-Dec-2021	Completed
HarbourVest Partners	East West Insurance Services	Buyout/LBO [†]		03-Aug-2017	Completed
HarbourVest Partners	Colorado Nonprofit Insurance Agency	Buyout/LBO [†]		06-Aug-2015	Completed
HarbourVest Partners	OSA Insurance Brokerage Services	Buyout/LBO [†]		05-Jan-2023	Completed
HarbourVest Partners	Kindersley Insurance	Buyout/LBO [†]		07-Feb-2018	Completed
HarbourVest Partners	G.P. Barich Insurance Agency	Buyout/LBO [†]		13-Dec-2018	Completed
HarbourVest Partners	Premiere Risk Management	Buyout/LBO [†]		03-Apr-2019	Completed
HarbourVest Partners	Cosaint Insurance Partners	Buyout/LBO [†]		10-Jul-2019	Completed
HarbourVest Partners	SilverStone Group	Buyout/LBO [†]		04-Dec-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Morneau Shepell (Benefits Consulting business)	Buyout/LBO [†]	\$70.00M	02-Mar-2020	Completed
HarbourVest Partners	Grace & Porta Benefits	Buyout/LBO [†]		27-Jul-2022	Completed
HarbourVest Partners	Leitao Insurance Agency	Buyout/LBO [†]		07-Mar-2018	Completed
HarbourVest Partners	HSBI Benefits	Buyout/LBO [†]		06-Jul-2016	Completed
HarbourVest Partners	Nordic Fund Market	Buyout/LBO [†]		14-Nov-2019	Completed
HarbourVest Partners	Gateway Benefits	Buyout/LBO [†]		05-Jul-2016	Completed
HarbourVest Partners	Radio & Records	Buyout/LBO [†]		01-Aug-2006	Completed
HarbourVest Partners	EmSpring	Buyout/LBO [†]		03-Sep-2015	Completed
HarbourVest Partners	Wealthplan Advisors	Buyout/LBO [†]		03-Aug-2022	Completed
HarbourVest Partners	Susoreny & Associates	Buyout/LBO [†]		02-Feb-2018	Completed
HarbourVest Partners	Nationwide Insurance Company (Property and Casualty Books of Business)	Buyout/LBO [†]		07-Aug-2019	Completed
HarbourVest Partners	Graffam Insurance Group	Buyout/LBO [†]		17-Oct-2017	Completed
HarbourVest Partners	Optimum Group Benefits & Insurance Services	Buyout/LBO [†]		09-Jul-2018	Completed
HarbourVest Partners	Rider Insurance Group	Buyout/LBO [†]		04-Nov-2021	Completed
HarbourVest Partners	Lovsted-Worthington Insurance	Buyout/LBO [†]		03-Jun-2015	Completed
HarbourVest Partners	APEX Global Benefit Management System	Buyout/LBO [†]		06-May-2022	Completed
HarbourVest Partners	Unilite Insurance Agency	Buyout/LBO [†]		11-Jul-2017	Completed
HarbourVest Partners	JAG Insurance Group	Buyout/LBO [†]		05-Apr-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Taylor Advisors	Buyout/LBO [†]		02-Mar-2022	Completed
HarbourVest Partners	TRG Group Benefits	Buyout/LBO [†]		01-Jan-2019	Completed
HarbourVest Partners	Custom Results Corporate Consulting	Buyout/LBO [†]		08-Jun-2023	Completed
HarbourVest Partners	United Shortline Insurance Services	Buyout/LBO [†]		01-Nov-2020	Completed
HarbourVest Partners	Juban Insurance Group	Buyout/LBO [†]		09-Mar-2021	Completed
HarbourVest Partners	Dissinger Reed	Buyout/LBO [†]		16-Aug-2021	Completed
HarbourVest Partners	Benefit Advisory Group	Buyout/LBO [†]		18-Sep-2017	Completed
HarbourVest Partners	The TAMRAC Group	Buyout/LBO [†]		01-Nov-2018	Completed
HarbourVest Partners	Hub International	Buyout/LBO	\$4.40B	02-Oct-2013	Completed
HarbourVest Partners	Harris Madden & Powell	Buyout/LBO [†]		10-Mar-2020	Completed
HarbourVest Partners	Carlton Insurance Brokers	Buyout/LBO [†]		03-May-2018	Completed
HarbourVest Partners	Hatchett Insurance	Buyout/LBO [†]		14-May-2020	Completed
HarbourVest Partners	Soundmark Wealth Management	Buyout/LBO [†]		13-May-2024	Completed
HarbourVest Partners	Carrion Laffitte & Casellas	Buyout/LBO [†]		01-Oct-2012	Completed
HarbourVest Partners	Bianchi & Associates	Buyout/LBO [†]		04-Aug-2017	Completed
HarbourVest Partners	Linton and Associates	Buyout/LBO [†]		04-Mar-2020	Completed
HarbourVest Partners	Perennial Pension & Wealth	Buyout/LBO [†]		15-Aug-2019	Completed
HarbourVest Partners	Gibson Deland Insurance (Marine Book of Business)	Buyout/LBO [†]		06-Nov-2019	Completed
HarbourVest Partners	Hickey & Associates (Certain Assets)	Buyout/LBO [†]		02-Sep-2016	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Conover Insurance	Buyout/LBO [†]		05-May-2021	Completed
HarbourVest Partners	Stalco Insurance	Buyout/LBO [†]		04-Nov-2020	Completed
HarbourVest Partners	Commercial Insurance Brokers	Buyout/LBO [†]		31-Dec-2020	Completed
HarbourVest Partners	Western Assurance	Buyout/LBO [†]		04-Mar-2022	Completed
HarbourVest Partners	Cassco Insurance	Buyout/LBO [†]		06-Mar-2017	Completed
HarbourVest Partners	Heritage Wealth Management Group	Buyout/LBO [†]		20-Jun-2022	Completed
HarbourVest Partners	Miniter Group	Buyout/LBO [†]		17-Aug-2022	Completed
HarbourVest Partners	Marwil & Associates	Buyout/LBO [†]		11-Oct-2017	Completed
HarbourVest Partners	Apex Insurance Brokers	Buyout/LBO [†]		14-Dec-2018	Completed
HarbourVest Partners	Dunagan Associates (Employee Benefits Book-of-Business)	Buyout/LBO [†]		07-Aug-2015	Completed
HarbourVest Partners	Chelsea Insurance Agency	Buyout/LBO [†]		08-Dec-2020	Completed
HarbourVest Partners	Patterson Insurance Brokers	Buyout/LBO [†]		07-Sep-2016	Completed
HarbourVest Partners	Easy Truck Insurance	Buyout/LBO [†]		04-May-2018	Completed
HarbourVest Partners	Riviera Insurance Services	Buyout/LBO [†]		01-Nov-2016	Completed
HarbourVest Partners	Desert Empire Insurance Services	Buyout/LBO [†]		04-Dec-2017	Completed
HarbourVest Partners	Usefulideas	Buyout/LBO [†]		02-Jun-2020	Completed
HarbourVest Partners	Harman Real Estate	Buyout/LBO [†]		05-Sep-2018	Completed
HarbourVest Partners	PRW Wealth Management	Buyout/LBO [†]		16-Nov-2023	Completed
HarbourVest Partners	Fundinfo (Fund Research Business)	Buyout/LBO [†]		08-Oct-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Laurus Strategies	Buyout/LBO [†]		04-Nov-2014	Completed
HarbourVest Partners	Verity Insurance Services	Buyout/LBO [†]		08-Oct-2021	Completed
HarbourVest Partners	Columbian Agency	Buyout/LBO [†]		02-Feb-2016	Completed
HarbourVest Partners	Eagle American Insurance Agency (Mesa and Denver Operations)	Buyout/LBO [†]		14-Jan-2021	Completed
HarbourVest Partners	Kornerstone	Buyout/LBO [†]		02-Feb-2022	Completed
HarbourVest Partners	Banyan Consulting Group	Buyout/LBO [†]		06-Oct-2017	Completed
HarbourVest Partners	Inter-Mountain Retirement Partners	Buyout/LBO [†]		15-Aug-2019	Completed
HarbourVest Partners	Costello & Sons Insurance	Buyout/LBO [†]		05-Oct-2017	Completed
HarbourVest Partners	Fortenberry McNamara	Buyout/LBO [†]		01-Feb-2019	Completed
HarbourVest Partners	Barnett Corporate Insurers	Buyout/LBO [†]		08-May-2018	Completed
HarbourVest Partners	Creative Benefits & Insurance Solutions	Buyout/LBO [†]		11-Jan-2023	Completed
HarbourVest Partners	N Compass Group	Buyout/LBO [†]		08-Apr-2015	Completed
HarbourVest Partners	Contractor's Services	Buyout/LBO [†]		01-Dec-2017	Completed
HarbourVest Partners	Arrow Insurance Service	Buyout/LBO [†]		02-Sep-2015	Completed
HarbourVest Partners	Scarborough Company Insurance	Buyout/LBO [†]		03-May-2017	Completed
HarbourVest Partners	W.R. Carey Corporation	Buyout/LBO [†]		08-Nov-2019	Completed
HarbourVest Partners	Benefit Broker Services	Buyout/LBO [†]		07-Aug-2018	Completed
HarbourVest Partners	Fiducia Group	Buyout/LBO [†]		01-Dec-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Millennium Advisory Services	Buyout/LBO [†]		27-Aug-2021	Completed
HarbourVest Partners	Williford Insurance Group	Buyout/LBO [†]		04-May-2022	Completed
HarbourVest Partners	ES3 Advisory	Buyout/LBO [†]		01-Apr-2018	Completed
HarbourVest Partners	IAS Associates	Buyout/LBO [†]		02-Oct-2015	Completed
HarbourVest Partners	Baystate Fiduciary Advisors	Buyout/LBO [†]		11-Nov-2020	Completed
HarbourVest Partners	Invensure Insurance Brokers	Buyout/LBO [†]		01-Dec-2022	Completed
HarbourVest Partners	Clearwater Insurance	Buyout/LBO [†]		10-Sep-2018	Completed
HarbourVest Partners	Tri-Star Insurance Professionals	Buyout/LBO [†]		03-Mar-2017	Completed
HarbourVest Partners	Chatham Insurance Partners	Buyout/LBO [†]		14-Dec-2022	Completed
HarbourVest Partners	Daniel Picard	Buyout/LBO [†]		11-Jan-2018	Completed
HarbourVest Partners	MPE Employee Benefit Services	Buyout/LBO [†]		18-Jan-2021	Completed
HarbourVest Partners	Bridgecreek Investment Management	Buyout/LBO [†]		10-Nov-2022	Completed
HarbourVest Partners	Catto & Catto	Buyout/LBO [†]		02-Dec-2021	Completed
HarbourVest Partners	Briargate Insurance Services	Buyout/LBO [†]		08-Jan-2020	Completed
HarbourVest Partners	Rural Alaska Insurance Agency	Buyout/LBO [†]		02-Oct-2017	Completed
HarbourVest Partners	Rogersworks	Buyout/LBO [†]		18-Oct-2021	Completed
HarbourVest Partners	RBI Advisory Group	Buyout/LBO [†]		04-Nov-2019	Completed
HarbourVest Partners	KC Insurance Group	Buyout/LBO [†]		05-Apr-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Newsura Insurance Services (Associated Property and Casualty Lines)	Buyout/LBO [†]		05-Nov-2019	Completed
HarbourVest Partners	Mayport Insurance & Realty	Buyout/LBO [†]		05-Oct-2016	Completed
HarbourVest Partners	Fox-Everett	Buyout/LBO [†]		01-Jun-2014	Completed
HarbourVest Partners	Clarity Benefits Group	Buyout/LBO [†]		07-May-2019	Completed
HarbourVest Partners	Larry Dean Massey	Buyout/LBO [†]		12-Nov-2020	Completed
HarbourVest Partners	KT&D	Buyout/LBO [†]		05-Aug-2022	Completed
HarbourVest Partners	Hanson Insurance Group	Buyout/LBO [†]		03-May-2022	Completed
HarbourVest Partners	Flather & Perkins	Buyout/LBO [†]		23-May-2018	Completed
HarbourVest Partners	Great North Insurance Services	Buyout/LBO [†]		05-May-2022	Completed
HarbourVest Partners	Employee Benefits Group	Buyout/LBO [†]		05-Nov-2015	Completed
HarbourVest Partners	Trusted Capital Group	Buyout/LBO [†]		01-Jul-2021	Completed
HarbourVest Partners	The Clements Agency	Buyout/LBO [†]		08-Jun-2020	Completed
HarbourVest Partners	RIMS Insurance Brokerage Corporation	Buyout/LBO [†]		08-May-2019	Completed
HarbourVest Partners	Tri Line Agencies	Buyout/LBO [†]		07-Nov-2018	Completed
HarbourVest Partners	Kelly King Insurance Services	Buyout/LBO [†]		02-May-2018	Completed
HarbourVest Partners	Triester, Rossman and Associates	Buyout/LBO [†]		06-Feb-2020	Completed
HarbourVest Partners	Charles R. Butler	Buyout/LBO [†]		08-Sep-2020	Completed
HarbourVest Partners	Stevens Dell and Associates	Buyout/LBO [†]		07-Nov-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Vestas Financial Services	Buyout/LBO [†]		13-May-2020	Completed
HarbourVest Partners	Resource Insurance Services	Buyout/LBO [†]		03-May-2019	Completed
HarbourVest Partners	Safe Harbor Group	Buyout/LBO [†]		12-Oct-2021	Completed
HarbourVest Partners	Foster & Parker Insurance	Buyout/LBO [†]		17-Jun-2019	Completed
HarbourVest Partners	Bernstein Insurance	Buyout/LBO [†]		07-Oct-2020	Completed
HarbourVest Partners	The HDH Group	Buyout/LBO [†]		02-Jul-2015	Completed
HarbourVest Partners	Ivari (MGA business)	Buyout/LBO [†]		02-Jul-2020	Completed
HarbourVest Partners	International Special Risks	Buyout/LBO [†]		26-Nov-2013	Completed
HarbourVest Partners	Wyoming Financial Insurance	Buyout/LBO [†]		07-Apr-2021	Completed
HarbourVest Partners	Rogers, Gunter, Vaughn	Buyout/LBO [†]		08-Aug-2017	Completed
HarbourVest Partners	Desilets Insurance Brokers	Buyout/LBO [†]		07-Mar-2018	Completed
HarbourVest Partners	RFO Enterprises	Buyout/LBO [†]		04-Nov-2015	Completed
HarbourVest Partners	Jamie Campbell Younger (Insurance Book of Business)	Buyout/LBO [†]		03-Nov-2016	Completed
HarbourVest Partners	Risk Point Consulting	Buyout/LBO [†]		16-Jul-2021	Completed
HarbourVest Partners	HMBD Insurance Services	Buyout/LBO [†]		03-Dec-2019	Completed
HarbourVest Partners	Executive Risk Management (Illinois)	Buyout/LBO [†]		05-Sep-2017	Completed
HarbourVest Partners	CSi Advisory Services	Buyout/LBO [†]		06-Jun-2022	Completed
HarbourVest Partners	Insure All	Buyout/LBO [†]		01-Nov-2020	Completed
HarbourVest Partners	WhartonHill Advisors	Buyout/LBO [†]		15-Aug-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	BenefitLink Resource Group	Buyout/LBO [†]		02-Jul-2019	Completed
HarbourVest Partners	Summit Financial Insurance Agency	Buyout/LBO [†]		27-Nov-2017	Completed
HarbourVest Partners	Stop Loss Insurance Brokers	Buyout/LBO [†]		27-Jul-2022	Completed
HarbourVest Partners	Colton Insurance Associates	Buyout/LBO [†]		06-Jun-2017	Completed
HarbourVest Partners	MDW Insurance	Buyout/LBO [†]		01-Dec-2016	Completed
HarbourVest Partners	Clearpoint Advisory Group	Buyout/LBO [†]		05-Oct-2020	Completed
HarbourVest Partners	Edelman Financial Engines	Buyout/LBO	\$800.00M	12-Oct-2015	Completed
HarbourVest Partners	Commercial Line Book of Business (Montana)	Buyout/LBO [†]		10-Dec-2019	Completed
HarbourVest Partners	Insureon	Buyout/LBO [†]		01-Mar-2022	Completed
HarbourVest Partners	Mumby Insurance (Property and Casualty and Employee Benefits Businesses)	Buyout/LBO [†]		08-Oct-2020	Completed
HarbourVest Partners	Axella Insurance Services	Buyout/LBO [†]		02-Nov-2017	Completed
HarbourVest Partners	Der Manouel Insurance Group	Buyout/LBO [†]		01-Feb-2018	Completed
HarbourVest Partners	Global Credit Risk Management	Buyout/LBO [†]		03-Jun-2021	Completed
HarbourVest Partners	Insurance Management Associates (Annapolis)	Buyout/LBO [†]		02-Nov-2018	Completed
HarbourVest Partners	Forum Risques et Assurance	Buyout/LBO [†]		09-Jan-2019	Completed
HarbourVest Partners	Johnston Lewis Associates	Buyout/LBO [†]		08-Jun-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Wellspring Insurance Agency	Buyout/LBO [†]		02-Mar-2021	Completed
HarbourVest Partners	Kuhl Insurance	Buyout/LBO [†]		07-Mar-2022	Completed
HarbourVest Partners	Christiansen Insurance Group	Buyout/LBO [†]		11-Jan-2021	Completed
HarbourVest Partners	Barrett & Associates (Indiana)	Buyout/LBO [†]		31-Dec-2019	Completed
HarbourVest Partners	Insurance Supermarket (certain assets)	Buyout/LBO [†]		07-Apr-2017	Completed
HarbourVest Partners	Beacon Hill Wealth Services (Retirement and Private Wealth Book of Business)	Buyout/LBO [†]		07-Jun-2021	Completed
HarbourVest Partners	Employers Resource Group Financial & Insurance Services	Buyout/LBO [†]		21-Feb-2017	Completed
HarbourVest Partners	Hiles-McLeod Insurance	Buyout/LBO [†]		05-Aug-2021	Completed
HarbourVest Partners	EnterMedicare	Buyout/LBO [†]		08-Jun-2021	Completed
HarbourVest Partners	Preferred Benefits Services Agency	Buyout/LBO [†]		12-Jan-2021	Completed
HarbourVest Partners	Kenneth A. Murray Insurance	Buyout/LBO [†]		09-Oct-2017	Completed
HarbourVest Partners	Align Wealth Management	Buyout/LBO [†]		03-Oct-2023	Completed
HarbourVest Partners	Tanna Insurance	Buyout/LBO [†]		01-Nov-2021	Completed
HarbourVest Partners	The Insurance Exchange (Insurance Brokers)	Buyout/LBO [†]		11-Mar-2019	Completed
HarbourVest Partners	Berk Bilgen Insurance	Buyout/LBO [†]		03-Jul-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	William Peragine III and John Biondo (brokerage services and investment advisory book of business)	Buyout/LBO [†]		17-Oct-2019	Completed
HarbourVest Partners	Stellarus Benefits	Buyout/LBO [†]		11-Sep-2017	Completed
HarbourVest Partners	LBA Insurance Services	Buyout/LBO [†]		07-Oct-2019	Completed
HarbourVest Partners	FirstBank Insurance Agency (certain assets)	Buyout/LBO [†]		03-Jun-2016	Completed
HarbourVest Partners	The Crichton Group	Buyout/LBO [†]		09-Jul-2019	Completed
HarbourVest Partners	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed
HarbourVest Partners	Marketing Management Associates	Buyout/LBO [†]		08-Apr-2022	Completed
HarbourVest Partners	Parq Advisors	Buyout/LBO [†]		18-Jul-2016	Completed
HarbourVest Partners	Tevis Insurance Solutions	Buyout/LBO [†]		30-Dec-2016	Completed
HarbourVest Partners	Cretcher Heartland	Buyout/LBO [†]		06-Aug-2019	Completed
HarbourVest Partners	RiteHealth Solutions	Buyout/LBO [†]		19-Mar-2019	Completed
HarbourVest Partners	M.B.I. Group	Buyout/LBO [†]		04-Mar-2019	Completed
HarbourVest Partners	Oxford Coverage	Buyout/LBO [†]		12-Oct-2015	Completed
HarbourVest Partners	Pippel Insurance Agency	Buyout/LBO [†]		05-Aug-2015	Completed
HarbourVest Partners	EPIC Retirement Services Consulting	Buyout/LBO [†]		15-Aug-2019	Completed
HarbourVest Partners	The Benefits Company	Buyout/LBO [†]		03-Apr-2018	Completed
HarbourVest Partners	Harmony Insurance (Commercial Lines Insurance)	Buyout/LBO [†]		05-Apr-2016	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Galon Insurance Brokers	Buyout/LBO [†]		02-Feb-2021	Completed
HarbourVest Partners	Livermore & Associates Insurance Services	Buyout/LBO [†]		01-Dec-2014	Completed
HarbourVest Partners	Salvatore Insurance Brokers	Buyout/LBO [†]		04-Jun-2021	Completed
HarbourVest Partners	Doctors Insurance Services of New England	Buyout/LBO [†]		17-Aug-2015	Completed
HarbourVest Partners	Advisory Businesses Of Quintes	Buyout/LBO [†]		06-Oct-2022	Completed
HarbourVest Partners	Wells Fargo Insurance (Crop Insurance Broker Business)	Buyout/LBO [†]		09-Nov-2017	Completed
HarbourVest Partners	Norton Insurance Agency	Buyout/LBO [†]		01-Oct-2016	Completed
HarbourVest Partners	Bubrig Insurance Agency	Buyout/LBO [†]		04-Aug-2022	Completed
HarbourVest Partners	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed
HarbourVest Partners	Calculated Risk Advisors	Buyout/LBO [†]		01-Nov-2021	Completed
HarbourVest Partners	Liberty New Gate	Buyout/LBO [†]		04-Oct-2018	Completed
HarbourVest Partners	Incentive Systems	Buyout/LBO [†]		05-Mar-2021	Completed
HarbourVest Partners	MMZ Associates	Buyout/LBO [†]		02-Jan-2015	Completed
HarbourVest Partners	Alpha Pension Group	Buyout/LBO [†]		31-Dec-2020	Completed
HarbourVest Partners	Heritage Corporate Benefits	Buyout/LBO [†]		03-Apr-2017	Completed
HarbourVest Partners	Integro (Canada)	Buyout/LBO [†]		01-Sep-2017	Completed
HarbourVest Partners	Raffa Financial Services	Buyout/LBO [†]		06-Jan-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Framberger Employee Benefits & Insurance Services	Buyout/LBO [†]		12-May-2015	Completed
HarbourVest Partners	The Right Choice Insurance Agency	Buyout/LBO [†]		03-Jul-2018	Completed
HarbourVest Partners	Gold Sky Benefits	Buyout/LBO [†]		09-Dec-2021	Completed
HarbourVest Partners	Cooper & Allison Insurance Agency	Buyout/LBO [†]		04-May-2021	Completed
HarbourVest Partners	Insurance Center of New England	Buyout/LBO [†]		05-Aug-2019	Completed
HarbourVest Partners	Proteus Performance Management	Buyout/LBO [†]		05-Nov-2018	Completed
HarbourVest Partners	Nolen Associates	Buyout/LBO [†]		11-Dec-2018	Completed
HarbourVest Partners	Capax Management & Insurance Services	Buyout/LBO [†]		31-Dec-2020	Completed
HarbourVest Partners	Hub International (Entertainment Book of Business)	Buyout/LBO [†]		10-Mar-2019	Completed
HarbourVest Partners	Plan Sponsor Consultants	Buyout/LBO [†]		02-Apr-2021	Completed
HarbourVest Partners	Wessex Financial	Buyout/LBO [†]		08-Apr-2021	Completed
HarbourVest Partners	Gus Bates Insurance & Investments	Buyout/LBO [†]		06-Jul-2020	Completed
HarbourVest Partners	Azur Consulting Services	Buyout/LBO [†]		10-Feb-2020	Completed
HarbourVest Partners	Dadgar Insurance Agency	Buyout/LBO [†]		12-Dec-2018	Completed
HarbourVest Partners	Olson Insurance Agency	Buyout/LBO [†]		01-Nov-2020	Completed
HarbourVest Partners	In-Fi	Buyout/LBO [†]		14-Jun-2019	Completed
HarbourVest Partners	Rise People (Employee Benefits Practice)	Buyout/LBO [†]		17-Dec-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Rhc Insurance Brokers	Buyout/LBO [†]		07-Jan-2020	Completed
HarbourVest Partners	Niedermeyer Risk Management	Buyout/LBO [†]		09-Mar-2022	Completed
HarbourVest Partners	Gonzalez & Goenaga	Buyout/LBO [†]		12-Apr-2016	Completed
HarbourVest Partners	PartnerRe	Buyout/LBO		21-Dec-2006	Completed
HarbourVest Partners	BK-JET Group	Buyout/LBO [†]		24-Apr-2018	Completed
HarbourVest Partners	Kuokoa Enterprises	Buyout/LBO [†]		08-Nov-2018	Completed
HarbourVest Partners	IPS Advisors	Buyout/LBO [†]		05-Feb-2018	Completed
HarbourVest Partners	Baker and Associates (Alaska)	Buyout/LBO [†]		03-Oct-2017	Completed
HarbourVest Partners	GRP Financial California	Buyout/LBO [†]		14-Dec-2021	Completed
HarbourVest Partners	Sheridan Road Financial	Buyout/LBO [†]		09-Jan-2019	Completed
HarbourVest Partners	Brady Insurance Planning	Buyout/LBO [†]		07-Jun-2017	Completed
HarbourVest Partners	Jones Retirement Plan Advisors	Buyout/LBO [†]		16-Oct-2018	Completed
HarbourVest Partners	Benefex Consulting	Buyout/LBO [†]		04-Feb-2020	Completed
HarbourVest Partners	Cosmo Insurance Service	Buyout/LBO [†]		05-Jan-2018	Completed
HarbourVest Partners	Shofner Lynch & Shulse	Buyout/LBO [†]		01-Jun-2015	Completed
HarbourVest Partners	Delisle Agencies	Buyout/LBO [†]		13-Sep-2017	Completed
HarbourVest Partners	Medley/Turrentine & Associates	Buyout/LBO [†]		06-Dec-2016	Completed
HarbourVest Partners	Barker Uerlings Insurance	Buyout/LBO [†]		03-Mar-2020	Completed
HarbourVest Partners	Pickett & Associates Insurance Agency	Buyout/LBO [†]		04-Apr-2016	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	New England Pension Plan Systems	Buyout/LBO [†]		14-Dec-2023	Completed
HarbourVest Partners	Regency Advisory Corporation	Buyout/LBO [†]		02-Oct-2019	Completed
HarbourVest Partners	Shaver-Robichaux Agency	Buyout/LBO [†]		08-Jul-2022	Completed
HarbourVest Partners	Priority Insurance Associates	Buyout/LBO [†]		03-Nov-2022	Completed
HarbourVest Partners	HUB Retirement and Wealth Management	Buyout/LBO [†]		04-Sep-2019	Completed
HarbourVest Partners	Healy Benefits	Buyout/LBO [†]		12-May-2020	Completed
HarbourVest Partners	Sweet & Baker Insurance Brokers	Buyout/LBO [†]		04-Oct-2016	Completed
HarbourVest Partners	dElta Benefits	Buyout/LBO [†]		07-May-2018	Completed
HarbourVest Partners	DFM Insurance Agency	Buyout/LBO [†]		09-Nov-2016	Completed
HarbourVest Partners	McNellis & Company	Buyout/LBO [†]		08-Sep-2021	Completed
HarbourVest Partners	Jerry Baird Insurance Agency	Buyout/LBO [†]		11-Oct-2021	Completed
HarbourVest Partners	The Ward Agency	Buyout/LBO [†]		06-Aug-2018	Completed
HarbourVest Partners	Finn & Stone	Buyout/LBO [†]		03-Mar-2021	Completed
HarbourVest Partners	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
HarbourVest Partners	Del Fisher Insurance	Buyout/LBO [†]		02-Apr-2019	Completed
HarbourVest Partners	Dale Barton Agency	Buyout/LBO [†]		12-Dec-2022	Completed
HarbourVest Partners	Basi Insurance Services	Buyout/LBO [†]		13-Dec-2021	Completed
HarbourVest Partners	Pointbreak Consulting Group	Buyout/LBO [†]		16-Feb-2018	Completed
HarbourVest Partners	Peak Financial Group (Texas)	Buyout/LBO [†]		07-Mar-2019	Completed
HarbourVest Partners	Cottenie and Gardner	Buyout/LBO [†]		04-Jun-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
HarbourVest Partners	Vitolo	Buyout/LBO [†]		16-Nov-2020	Completed
HarbourVest Partners	Global Retirement Partners	Buyout/LBO [†]		04-Sep-2019	Completed
HarbourVest Partners	Midland Agency Insurance	Buyout/LBO [†]		11-Mar-2022	Completed
HarbourVest Partners	City Insurance Services	Buyout/LBO [†]		01-May-2017	Completed
HarbourVest Partners	HUB Ontario	Buyout/LBO [†]		12-Feb-2019	Completed
HarbourVest Partners	Direct Advisors	Buyout/LBO [†]		07-Sep-2022	Completed
HarbourVest Partners	LSM Insurance	Buyout/LBO [†]		05-Mar-2020	Completed
HarbourVest Partners	Coast to Coast Insurance Brokers	Buyout/LBO [†]		10-Jan-2023	Completed
Health Enterprise Partners	Sheridan Healthcare	Buyout/LBO	\$925.00M	21-May-2007	Completed
Health Enterprise Partners	Liberty Anesthesia	Buyout/LBO [†]		01-Sep-2013	Completed
Hg	Phroot	Buyout/LBO [†]		01-Jul-2013	Completed
Hg	NetLex (Rome)	Buyout/LBO [†]		01-Apr-2017	Completed
Hg	EvolutionFit	Buyout/LBO [†]		01-Jun-2017	Completed
Hg	MadBit Entertainment	Buyout/LBO [†]		15-Sep-2015	Completed
Hg	Informatica Veneta	Buyout/LBO [†]		01-Sep-2016	Completed
Hg	Globase International	Buyout/LBO [†]		12-Jul-2023	Completed
Hg	Mondora	Buyout/LBO [†]	\$0.90M	01-Jun-2016	Completed
Hg	MBM Italia	Buyout/LBO [†]		08-Apr-2020	Completed
Hg	ITReview	Buyout/LBO [†]		18-Oct-2022	Completed
Hg	Area32	Buyout/LBO [†]		01-Feb-2020	Completed
Hg	Billin	Buyout/LBO [†]		17-Feb-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hg	TS C&D	Buyout/LBO [†]		01-Dec-2016	Completed
Hg	Ulisse Tecnologie	Buyout/LBO [†]	\$1.90M	31-Dec-2015	Completed
Hg	Microntel	Buyout/LBO [†]		20-Mar-2023	Completed
Hg	Change Capital	Buyout/LBO [†]		25-Jun-2024	Completed
Hg	Mondoesa Laghi	Buyout/LBO [†]	\$0.10M	31-Dec-2015	Completed
Hg	Sogesi	Buyout/LBO [†]		23-Feb-2021	Completed
Hg	modeFinance	Buyout/LBO [†]		03-Mar-2021	Completed
Hg	AliasLab	Buyout/LBO [†]		01-Dec-2016	Completed
Hg	Alkè (Information Technology Division)	Buyout/LBO [†]		01-Sep-2016	Completed
Hg	ATW Information Technology Systems	Buyout/LBO [†]		01-Jan-2009	Completed
Hg	Logical Soft	Buyout/LBO [†]		04-Nov-2021	Completed
Hg	Morning (Tel Aviv)	Buyout/LBO [†]	\$150.00M	22-Dec-2024	Completed
Hg	TeamSystem	Buyout/LBO		15-Jan-2021	Completed
Hg	Aplifisa	Buyout/LBO [†]		23-May-2023	Completed
Hg	ContactLab	Buyout/LBO [†]		13-Jul-2023	Completed
Hg	Distrito K	Buyout/LBO [†]		17-Sep-2024	Completed
Hg	Sedas	Buyout/LBO [†]		20-Jan-2022	Completed
Hg	Beneficy	Buyout/LBO [†]		29-May-2020	Completed
Hg	Cassanova	Buyout/LBO [†]		01-Jul-2017	Completed
Hg	Software Del Sol	Buyout/LBO [†]		17-Feb-2021	Completed
Hg	Multimedia IT	Buyout/LBO [†]		01-Jun-2017	Completed
Hg	Software Time	Buyout/LBO [†]		31-May-2017	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hg	Acumbamail	Buyout/LBO [†]		13-Jul-2023	Completed
Hg	Storeden	Buyout/LBO [†]		14-Feb-2022	Completed
Hg	Readytec	Buyout/LBO [†]		06-Apr-2023	Completed
Hg	Golden Soft	Buyout/LBO [†]		27-Feb-2025	Completed
Hg	Drummohr Technology	Buyout/LBO [†]		01-May-2008	Completed
Hg	Multidata	Buyout/LBO [†]		13-Mar-2023	Completed
Hg	Caliò Informatica	Buyout/LBO [†]		23-Feb-2021	Completed
Hg	Muscope	Buyout/LBO [†]		18-Nov-2024	Completed
Hg	Greenext Technologies	Buyout/LBO [†]		01-May-2023	Completed
Hg	PROJECTminder	Buyout/LBO [†]		01-Jan-2009	Completed
Hg	Poker (Italy)	Buyout/LBO [†]		01-Mar-2024	Completed
Hostelworld Group	HostelBookers.com	Buyout/LBO [†]	\$77.00M	27-Aug-2013	Completed
Hub International	Salvatore Insurance Brokers	Buyout/LBO [†]		04-Jun-2021	Completed
Hub International	HUB Ontario	Buyout/LBO [†]		12-Feb-2019	Completed
Hub International	Shepard Walton King Insurance	Buyout/LBO [†]		07-Dec-2021	Completed
Hub International	Greene Hazel Insurance Group	Buyout/LBO [†]		02-Mar-2016	Completed
Hub International	Scott Held Insurance Agency	Buyout/LBO [†]		04-Jun-2025	Completed
Hub International	Unilite Insurance Agency	Buyout/LBO [†]		11-Jul-2017	Completed
Hub International	Seeger Benefits & Insurance Services	Buyout/LBO [†]		03-Jan-2014	Completed
Hub International	Global Credit Risk Management	Buyout/LBO [†]		03-Jun-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Hub International (Entertainment Book of Business)	Buyout/LBO [†]		10-Mar-2019	Completed
Hub International	Harmony Insurance	Buyout/LBO [†]		05-Apr-2016	Completed
Hub International	Global Retirement Partners	Buyout/LBO ^{†*}		04-Sep-2019	Completed
Hub International	EPG Insurance Agency	Buyout/LBO [†]		01-Oct-2021	Completed
Hub International	LSM Insurance	Buyout/LBO [†]		05-Mar-2020	Completed
Hub International	Symphony Financial & Insurance Services	Buyout/LBO [†]		06-Jun-2024	Completed
Hub International	JAG Insurance Group	Buyout/LBO [†]		05-Apr-2022	Completed
Hub International	East West Insurance Services	Buyout/LBO [†]		03-Aug-2017	Completed
Hub International	Fortenberry McNamara	Buyout/LBO [†]		01-Feb-2019	Completed
Hub International	Catto & Catto	Buyout/LBO [†]		02-Dec-2021	Completed
Hub International	John O. Bronson	Buyout/LBO [†]		02-Dec-2014	Completed
Hub International	Stevens Dell and Associates	Buyout/LBO [†]		07-Nov-2019	Completed
Hub International	Pollock Insurance	Buyout/LBO [†]		04-Apr-2024	Completed
Hub International	RFO Enterprises	Buyout/LBO [†]		04-Nov-2015	Completed
Hub International	Gibson's Insurance Agency	Buyout/LBO [†]		07-Jul-2014	Completed
Hub International	Summit Financial Insurance Agency	Buyout/LBO [†]		27-Nov-2017	Completed
Hub International	Defranco Insurance	Buyout/LBO [†]		06-Apr-2023	Completed
Hub International	Brown Agency	Buyout/LBO [†]		04-Sep-2015	Completed
Hub International	Commercial Line Book of Business (Montana)	Buyout/LBO [†]		10-Dec-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Employers Resource Group Financial & Insurance Services	Buyout/LBO [†]		21-Feb-2017	Completed
Hub International	Kuhl Insurance	Buyout/LBO [†]		07-Mar-2022	Completed
Hub International	Tevis Insurance Solutions	Buyout/LBO [†]		30-Dec-2016	Completed
Hub International	The Right Choice Insurance Agency	Buyout/LBO [†]		03-Jul-2018	Completed
Hub International	Plan Sponsor Consultants	Buyout/LBO [†]		02-Apr-2021	Completed
Hub International	Spectra Management	Buyout/LBO [†]		05-Mar-2018	Completed
Hub International	RIMS Insurance Brokerage Corporation	Buyout/LBO [†]		08-May-2019	Completed
Hub International	Banco Management (managing general agent business)	Buyout/LBO [†]		12-Sep-2017	Completed
Hub International	Benefit Strategies Agency	Buyout/LBO [†]		04-Mar-2021	Completed
Hub International	First Florida Insurance	Buyout/LBO [†]		08-Jul-2021	Completed
Hub International	IPS Advisors	Buyout/LBO [†]		05-Feb-2018	Completed
Hub International	Priority Insurance Associates	Buyout/LBO [†]		03-Nov-2022	Completed
Hub International	Pointbreak Consulting Group	Buyout/LBO [†]		16-Feb-2018	Completed
Hub International	Todd and Associates (Louisiana)	Buyout/LBO [†]		09-Sep-2020	Completed
Hub International	Patterson Insurance Brokers	Buyout/LBO [†]		07-Sep-2016	Completed
Hub International	Intercontinental Growth Strategies	Buyout/LBO [†]		08-Aug-2022	Completed
Hub International	Elevate Insurance Brokers	Buyout/LBO [†]		01-Sep-2020	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Hatchett Insurance	Buyout/LBO [†]		14-May-2020	Completed
Hub International	Lashua Lachance and Poliks Insurance Agency	Buyout/LBO [†]		15-May-2020	Completed
Hub International	Ward Insurance	Buyout/LBO [†]		06-Jul-2021	Completed
Hub International	Premiere Risk Management	Buyout/LBO [†]		03-Apr-2019	Completed
Hub International	Anco Insurance Managers	Buyout/LBO [†]		11-Nov-2024	Completed
Hub International	Benefit Advisory Group	Buyout/LBO [†]		18-Sep-2017	Completed
Hub International	Linton and Associates	Buyout/LBO [†]		04-Mar-2020	Completed
Hub International	Miniter Group	Buyout/LBO [†]		17-Aug-2022	Completed
Hub International	Hadfield Agency	Buyout/LBO [†]		09-Dec-2024	Completed
Hub International	Heritage Wealth Management Group	Buyout/LBO [†]		20-Jun-2022	Completed
Hub International	N Compass Group	Buyout/LBO [†]		08-Apr-2015	Completed
Hub International	Arrow Insurance Service	Buyout/LBO [†]		02-Sep-2015	Completed
Hub International	W.R. Carey Corporation	Buyout/LBO [†]		08-Nov-2019	Completed
Hub International	Brady Risk Management	Buyout/LBO [†]		01-Apr-2023	Completed
Hub International	Global Ag Risk Solutions	Buyout/LBO [†]		05-Nov-2024	Completed
Hub International	Millennium Advisory Services	Buyout/LBO [†]		27-Aug-2021	Completed
Hub International	Fiducia Group	Buyout/LBO [†]		01-Dec-2021	Completed
Hub International	Clearwater Insurance	Buyout/LBO [†]		10-Sep-2018	Completed
Hub International	Employee Benefit Associates	Buyout/LBO [†]		08-Apr-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Bridgecreek Investment Management	Buyout/LBO ^{†*}		10-Nov-2022	Completed
Hub International	EVO Insurance Services	Buyout/LBO [†]		12-Apr-2022	Completed
Hub International	MPE Employee Benefit Services	Buyout/LBO ^{†*}		18-Jan-2021	Completed
Hub International	RBI Advisory Group	Buyout/LBO [†]		04-Nov-2019	Completed
Hub International	Rural Alaska Insurance Agency	Buyout/LBO [†]		02-Oct-2017	Completed
Hub International	Daniel Picard	Buyout/LBO [†]		11-Jan-2018	Completed
Hub International	Safe Harbor Group	Buyout/LBO [†]		12-Oct-2021	Completed
Hub International	Mayport Insurance & Realty	Buyout/LBO [†]		05-Oct-2016	Completed
Hub International	Great North Insurance Services	Buyout/LBO [†]		05-May-2022	Completed
Hub International	Barnett Corporate Insurers	Buyout/LBO [†]		08-May-2018	Completed
Hub International	WestStar Insurance	Buyout/LBO [†]		09-Oct-2024	Completed
Hub International	Kelly King Insurance Services	Buyout/LBO [†]		02-May-2018	Completed
Hub International	Resource Insurance Services	Buyout/LBO [†]		03-May-2019	Completed
Hub International	Fifth Avenue Agency	Buyout/LBO [†]		16-May-2025	Completed
Hub International	Foster & Parker Insurance	Buyout/LBO [†]		17-Jun-2019	Completed
Hub International	The HDH Group	Buyout/LBO ^{†*}		02-Jul-2015	Completed
Hub International	CSi Advisory Services	Buyout/LBO [†]		06-Jun-2022	Completed
Hub International	International Special Risks	Buyout/LBO [†]		26-Nov-2013	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Vestas Financial Services	Buyout/LBO [†]		13-May-2020	Completed
Hub International	Gathings Insurance Services	Buyout/LBO [†]		06-Jan-2015	Completed
Hub International	HMBD Insurance Services	Buyout/LBO [†]		03-Dec-2019	Completed
Hub International	Galon Insurance Brokers	Buyout/LBO [†]		02-Feb-2021	Completed
Hub International	Executive Risk Management (Illinois)	Buyout/LBO [†]		05-Sep-2017	Completed
Hub International	Axella Insurance Services	Buyout/LBO [†]		02-Nov-2017	Completed
Hub International	WhartonHill Advisors	Buyout/LBO [†]		15-Aug-2019	Completed
Hub International	Risk Point Consulting	Buyout/LBO [†]		16-Jul-2021	Completed
Hub International	Stop Loss Insurance Brokers	Buyout/LBO [†]		27-Jul-2022	Completed
Hub International	BenefitLink Resource Group	Buyout/LBO [†]		02-Jul-2019	Completed
Hub International	Mumby Insurance (Property and Casualty and Employee Benefits Businesses)	Buyout/LBO [†]		08-Oct-2020	Completed
Hub International	Hiles-McLeod Insurance	Buyout/LBO [†]		05-Aug-2021	Completed
Hub International	Allegiant Global Partners	Buyout/LBO [†]		05-May-2025	Completed
Hub International	Der Manouel Insurance Group	Buyout/LBO [†]		01-Feb-2018	Completed
Hub International	Wellspring Insurance Agency	Buyout/LBO [†]		02-Mar-2021	Completed
Hub International	The Flood Group	Buyout/LBO [†]		07-Apr-2015	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Beacon Hill Wealth Services (Retirement and Private Wealth Book of Business)	Buyout/LBO [†]		07-Jun-2021	Completed
Hub International	Barrett & Associates (Indiana)	Buyout/LBO [†]		31-Dec-2019	Completed
Hub International	EnterMedicare	Buyout/LBO [†]		08-Jun-2021	Completed
Hub International	Clark 401k Consulting	Buyout/LBO [†]		08-Aug-2024	Completed
Hub International	William Peragine III and John Biondo (brokerage services and investment advisory book of business)	Buyout/LBO [†]		17-Oct-2019	Completed
Hub International	LBA Insurance Services	Buyout/LBO [†]		07-Oct-2019	Completed
Hub International	Parq Advisors	Buyout/LBO [†]		18-Jul-2016	Completed
Hub International	Insurance Supermarket (certain assets)	Buyout/LBO [†]		07-Apr-2017	Completed
Hub International	M.B.I. Group	Buyout/LBO [†]		04-Mar-2019	Completed
Hub International	The Wooditch Company	Buyout/LBO [†]		02-May-2023	Completed
Hub International	Wycoff Insurance Agency	Buyout/LBO [†]		05-Jun-2025	Completed
Hub International	Oxford Coverage	Buyout/LBO [†]		12-Oct-2015	Completed
Hub International	Alpha Pension Group	Buyout/LBO [†]		31-Dec-2020	Completed
Hub International	Wade Associates	Buyout/LBO [†]		22-Jul-2024	Completed
Hub International	Calculated Risk Advisors	Buyout/LBO [†]		01-Nov-2021	Completed
Hub International	Norton Insurance Agency	Buyout/LBO [†]		01-Oct-2016	Completed
Hub International	Heritage Corporate Benefits	Buyout/LBO [†]		03-Apr-2017	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Framberger Employee Benefits & Insurance Services	Buyout/LBO [†]		12-May-2015	Completed
Hub International	Insurance Center of New England	Buyout/LBO [†]		05-Aug-2019	Completed
Hub International	Great Basin Insurance Eugene	Buyout/LBO [†]		04-Oct-2023	Completed
Hub International	Cooper & Allison Insurance Agency	Buyout/LBO [†]		04-May-2021	Completed
Hub International	Cusson & Anderson Financial Services	Buyout/LBO [†]		02-Apr-2014	Completed
Hub International	Veripax Wealth Management	Buyout/LBO [†]		09-Jun-2025	Completed
Hub International	Capax Management & Insurance Services	Buyout/LBO [†]		31-Dec-2020	Completed
Hub International	Olson Insurance Agency	Buyout/LBO [†]		01-Nov-2020	Completed
Hub International	Wessex Financial	Buyout/LBO [†]		08-Apr-2021	Completed
Hub International	Alliance Assurance (Auto Dealer Business)	Buyout/LBO ^{†*}		20-Oct-2014	Completed
Hub International	Rise People (Employee Benefits Practice)	Buyout/LBO [†]		17-Dec-2018	Completed
Hub International	Phil Bailey & Associates	Buyout/LBO [†]		04-Sep-2019	Completed
Hub International	Horizon Agency	Buyout/LBO [†]		04-Apr-2023	Completed
Hub International	Hub International Ottawa	Buyout/LBO [†]		07-Sep-2018	Completed
Hub International	Hollis Companies	Buyout/LBO [†]		04-Sep-2020	Completed
Hub International	BW Insurance Agency	Buyout/LBO [†]		04-Aug-2015	Completed
Hub International	MGIS Property & Casualty Insurance Services (Western Business Unit)	Buyout/LBO [†]		19-Jun-2012	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	GJJK	Buyout/LBO [†]		07-Sep-2023	Completed
Hub International	Henry M. Murray Agency	Buyout/LBO [†]		01-Jun-2017	Completed
Hub International	Tilghman Insurance of Myrtle Beach	Buyout/LBO [†]		08-Sep-2022	Completed
Hub International	Gregory Benefits & Consulting	Buyout/LBO [†]		08-Dec-2021	Completed
Hub International	CoverWallet (Certain Assets in United States)	Buyout/LBO [†]	\$38.00M	30-Sep-2023	Completed
Hub International	Kelliher Agencies	Buyout/LBO [†]		06-May-2019	Completed
Hub International	Mainline Insurance Brokers	Buyout/LBO [†]		04-Jan-2017	Completed
Hub International	Blackstone Insurance, Benefits & Bonding	Buyout/LBO [†]		08-Aug-2018	Completed
Hub International	Health Insurance Consultants	Buyout/LBO [†]		08-Jun-2023	Completed
Hub International	Glacier Insurance of Libby	Buyout/LBO [†]		03-Mar-2023	Completed
Hub International	R.K. Gore & Associates	Buyout/LBO [†]		13-Nov-2024	Completed
Hub International	Signature Insurance Group	Buyout/LBO ^{†*}		02-Apr-2012	Completed
Hub International	Corey Steinbach Insurance Agency	Buyout/LBO [†]		05-Apr-2019	Completed
Hub International	Kuokoa Enterprises	Buyout/LBO [†]		08-Nov-2018	Completed
Hub International	Sheridan Road Financial	Buyout/LBO [†]		09-Jan-2019	Completed
Hub International	BK-JET Group	Buyout/LBO [†]		24-Apr-2018	Completed
Hub International	GRP Financial California	Buyout/LBO [†]		14-Dec-2021	Completed
Hub International	Skinner & Company	Buyout/LBO [†]		01-Jul-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Demarie Insurance Agency	Buyout/LBO [†]		07-May-2025	Completed
Hub International	Brady Insurance Planning	Buyout/LBO [†]		07-Jun-2017	Completed
Hub International	Preferred Services Group	Buyout/LBO [†]		06-Mar-2024	Completed
Hub International	Shofner Lynch & Shulse	Buyout/LBO [†]		01-Jun-2015	Completed
Hub International	HUB Retirement and Wealth Management	Buyout/LBO [†]		04-Sep-2019	Completed
Hub International	Barker Uerlings Insurance	Buyout/LBO [†]		03-Mar-2020	Completed
Hub International	Pickett & Associates Insurance Agency	Buyout/LBO [†]		04-Apr-2016	Completed
Hub International	Frinell Risk Advisors	Buyout/LBO [†]		06-Jul-2023	Completed
Hub International	FieldEddy	Buyout/LBO [†]		07-Oct-2014	Completed
Hub International	Fotek Insurance Agency	Buyout/LBO [†]		05-Nov-2014	Completed
Hub International	Healy Benefits	Buyout/LBO [†]		12-May-2020	Completed
Hub International	DFM Insurance Agency	Buyout/LBO [†]		09-Nov-2016	Completed
Hub International	Jerry Baird Insurance Agency	Buyout/LBO [†]		11-Oct-2021	Completed
Hub International	Cottenie and Gardner	Buyout/LBO [†]		04-Jun-2019	Completed
Hub International	Joseph Aiello & Associates	Buyout/LBO [†]		08-Jun-2023	Completed
Hub International	City Insurance Services	Buyout/LBO [†]		01-May-2017	Completed
Hub International	Disability Book of Business	Buyout/LBO [†]		16-Aug-2019	Completed
Hub International	Peak Financial Group (Texas)	Buyout/LBO [†]		07-Mar-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Ballard Insurance Agency	Buyout/LBO [†]		04-Aug-2014	Completed
Hub International	Miv Insurance	Buyout/LBO [†]		05-Mar-2025	Completed
Hub International	Jordan Sibling (Retirement and Private Wealth Books of Business)	Buyout/LBO [†]		07-Mar-2025	Completed
Hub International	Kokkoris Insurance Services	Buyout/LBO ^{†*}		23-Jan-2020	Completed
Hub International	Hub International (Motorsports Book Of Business)	Buyout/LBO [†]		06-Feb-2019	Completed
Hub International	ProCorp Financial	Buyout/LBO [†]		04-Oct-2019	Completed
Hub International	Byrnes Agency Insurance	Buyout/LBO [†]		09-Jan-2025	Completed
Hub International	Physicians Risk Associates Insurance Agency	Buyout/LBO [†]		07-Jun-2022	Completed
Hub International	Porchlight Financial	Buyout/LBO [†]		06-Jun-2019	Completed
Hub International	Elkins Jones Insurance Agency	Buyout/LBO [†]		01-Jan-2017	Completed
Hub International	Ibex Enterprises (Life and Health Assets)	Buyout/LBO [†]		01-Jun-2023	Completed
Hub International	Coordinated Resources Group	Buyout/LBO [†]		09-Aug-2017	Completed
Hub International	JP Griffin Group	Buyout/LBO [†]		15-Dec-2021	Completed
Hub International	Cowan Benefit Services	Buyout/LBO [†]		05-Jan-2016	Completed
Hub International	Red Rock Financial	Buyout/LBO [†]		10-Apr-2023	Completed
Hub International	Leavitt Insurance Services of Southern California	Buyout/LBO [†]		02-Mar-2017	Completed
Hub International	RPG Solutions	Buyout/LBO [†]		18-Jan-2016	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	First National Administrators	Buyout/LBO [†]		04-Mar-2014	Completed
Hub International	Hometown Insurance Brokers	Buyout/LBO [†]		11-Sep-2018	Completed
Hub International	Cypher Systems (Insurance Brokerage Division)	Buyout/LBO [†]		02-Aug-2018	Completed
Hub International	Independent Financial Concepts Group	Buyout/LBO [†]		10-Jul-2018	Completed
Hub International	National Home Warranty Group	Buyout/LBO [†]		04-Oct-2021	Completed
Hub International	PDF Financial	Buyout/LBO [†]		08-Oct-2019	Completed
Hub International	The B&G Group	Buyout/LBO [†]		01-May-2020	Completed
Hub International	1st Alaska Insurance	Buyout/LBO [†]		02-Jun-2016	Completed
Hub International	G.P. Barich Insurance Agency	Buyout/LBO [†]		13-Dec-2018	Completed
Hub International	Peel & Holland	Buyout/LBO [†]		10-Apr-2022	Completed
Hub International	Cosaint Insurance Partners	Buyout/LBO [†]		10-Jul-2019	Completed
Hub International	Custom Results Corporate Consulting	Buyout/LBO [†]		08-Jun-2023	Completed
Hub International	Kindersley Insurance	Buyout/LBO [†]		07-Feb-2018	Completed
Hub International	Otter Insurance Agency	Buyout/LBO [†]		11-Dec-2024	Completed
Hub International	Morneau Shepell (Benefits Consulting business)	Buyout/LBO [†]	\$70.00M	02-Mar-2020	Completed
Hub International	Susoreny & Associates	Buyout/LBO [†]		02-Feb-2018	Completed
Hub International	Drayton Valley Insurance Agency	Buyout/LBO [†]		06-Mar-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Nationwide Insurance Company (Property and Casualty Books of Business)	Buyout/LBO [†]		07-Aug-2019	Completed
Hub International	First Santa Fe Insurance Services	Buyout/LBO [†]		03-May-2016	Completed
Hub International	Optimum Group Benefits & Insurance Services	Buyout/LBO [†]		09-Jul-2018	Completed
Hub International	Taylor Advisors	Buyout/LBO [†]		02-Mar-2022	Completed
Hub International	Lovsted-Worthington Insurance	Buyout/LBO [†]		03-Jun-2015	Completed
Hub International	Juban Insurance Group	Buyout/LBO [†]		09-Mar-2021	Completed
Hub International	The TAMRAC Group	Buyout/LBO [†]		01-Nov-2018	Completed
Hub International	United Shortline Insurance Services	Buyout/LBO [†]		01-Nov-2020	Completed
Hub International	Carlton Insurance Brokers	Buyout/LBO [†]		03-May-2018	Completed
Hub International	Carrion Laffitte & Casellas	Buyout/LBO [†]		01-Oct-2012	Completed
Hub International	Gibson Deland Insurance (Marine Book of Business)	Buyout/LBO [†]		06-Nov-2019	Completed
Hub International	Conover Insurance	Buyout/LBO [†]		05-May-2021	Completed
Hub International	Meyers Glaros	Buyout/LBO [†]		10-Jun-2024	Completed
Hub International	Stalco Insurance	Buyout/LBO [†]		04-Nov-2020	Completed
Hub International	GNW-Evergreen Insurance Services	Buyout/LBO [†]		06-Jan-2014	Completed
Hub International	Insurance Management Company	Buyout/LBO [†]		06-Aug-2024	Completed
Hub International	Edbrooke/Stelcner and Associates	Buyout/LBO [†]		17-Jul-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Chelsea Insurance Agency	Buyout/LBO [†]		08-Dec-2020	Completed
Hub International	Desert Empire Insurance Services	Buyout/LBO [†]		04-Dec-2017	Completed
Hub International	Hub International Florida	Buyout/LBO [†]		02-Oct-2014	Completed
Hub International	2197747 Alberta Ltd (Certain Assets in Alberta)	Buyout/LBO [†]		08-May-2024	Completed
Hub International	Kornerstone	Buyout/LBO [†]		02-Feb-2022	Completed
Hub International	Perennial Pension & Wealth	Buyout/LBO [†]		15-Aug-2019	Completed
Hub International	Banyan Consulting Group	Buyout/LBO [†]		06-Oct-2017	Completed
Hub International	Riviera Insurance Services	Buyout/LBO [†]		01-Nov-2016	Completed
Hub International	Inter-Mountain Retirement Partners	Buyout/LBO [†]		15-Aug-2019	Completed
Hub International	2837932 Ontario	Buyout/LBO [†]		17-Jul-2024	Completed
Hub International	Creative Benefits & Insurance Solutions	Buyout/LBO [†]		11-Jan-2023	Completed
Hub International	Costello & Sons Insurance	Buyout/LBO [†]		05-Oct-2017	Completed
Hub International	Verity Insurance Services	Buyout/LBO [†]		08-Oct-2021	Completed
Hub International	Eagle American Insurance Agency (Mesa and Denver Operations)	Buyout/LBO [†]		14-Jan-2021	Completed
Hub International	Laurus Strategies	Buyout/LBO [†]		04-Nov-2014	Completed
Hub International	Harman Real Estate	Buyout/LBO [†]		05-Sep-2018	Completed
Hub International	Equity Risk Partners	Buyout/LBO [†]		03-Feb-2016	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Usefulideas	Buyout/LBO [†]		02-Jun-2020	Completed
Hub International	Medley/Turrentine & Associates	Buyout/LBO [†]		06-Dec-2016	Completed
Hub International	Easy Truck Insurance	Buyout/LBO [†]		04-May-2018	Completed
Hub International	Columbian Agency	Buyout/LBO [†]		02-Feb-2016	Completed
Hub International	Apex Insurance Brokers	Buyout/LBO [†]		14-Dec-2018	Completed
Hub International	Cassco Insurance	Buyout/LBO [†]		06-Mar-2017	Completed
Hub International	Hickey & Associates (Certain Assets)	Buyout/LBO [†]		02-Sep-2016	Completed
Hub International	Marwil & Associates	Buyout/LBO [†]		11-Oct-2017	Completed
Hub International	Western Assurance	Buyout/LBO [†]		04-Mar-2022	Completed
Hub International	The Tammariello Group	Buyout/LBO ^{†*}		04-Feb-2014	Completed
Hub International	Woods Insurance Service	Buyout/LBO [†]		31-Dec-2024	Completed
Hub International	Bianchi & Associates	Buyout/LBO [†]		04-Aug-2017	Completed
Hub International	Harris Madden & Powell	Buyout/LBO [†]		10-Mar-2020	Completed
Hub International	TRG Group Benefits	Buyout/LBO [†]		01-Jan-2019	Completed
Hub International	APEX Global Benefit Management System	Buyout/LBO [†]		06-May-2022	Completed
Hub International	HSBI Benefits	Buyout/LBO [†]		06-Jul-2016	Completed
Hub International	Merriwether & Williams Insurance Services	Buyout/LBO [†]		02-May-2024	Completed
Hub International	Henriott Group	Buyout/LBO [†]		01-Apr-2025	Completed
Hub International	Rider Insurance Group	Buyout/LBO [†]		04-Nov-2021	Completed
Hub International	DAR The Rocchio Agency	Buyout/LBO [†]		06-Feb-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	EmSpring	Buyout/LBO ^{†*}		03-Sep-2015	Completed
Hub International	Gateway Benefits	Buyout/LBO [†]		05-Jul-2016	Completed
Hub International	Leitao Insurance Agency	Buyout/LBO [†]		07-Mar-2018	Completed
Hub International	Shattuck & Grummett Insurance	Buyout/LBO [†]		03-Dec-2021	Completed
Hub International	First Western Insurance Agency	Buyout/LBO [†]		02-May-2019	Completed
Hub International	OSA Insurance Brokerage Services	Buyout/LBO ^{†*}		05-Jan-2023	Completed
Hub International	Chun-Ha Insurance Services	Buyout/LBO [†]		04-Apr-2022	Completed
Hub International	Business Benefits Resource	Buyout/LBO [†]		08-Jun-2023	Completed
Hub International	Progressive Home Warranty Solutions	Buyout/LBO ^{†*}		31-Mar-2015	Completed
Hub International	Sarjeant Insurance Brokers	Buyout/LBO [†]		08-Sep-2016	Completed
Hub International	Cranbrook Bloomfield Insurance Agency	Buyout/LBO [†]		31-Dec-2019	Completed
Hub International	Winter Harbor Insurance Group	Buyout/LBO [†]		25-Aug-2022	Completed
Hub International	StoneStreet Advisor Group	Buyout/LBO [†]		04-Sep-2019	Completed
Hub International	Sandy Spring Insurance	Buyout/LBO [†]		01-Jun-2022	Completed
Hub International	Kilbride & Harris Insurance Services	Buyout/LBO [†]		09-Aug-2019	Completed
Hub International	LISSC	Buyout/LBO [†]		02-Mar-2017	Completed
Hub International	TYG Insurance	Buyout/LBO [†]		06-Mar-2018	Completed
Hub International	AG Direct Hail Insurance	Buyout/LBO [†]		23-Feb-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Guru of Insurance	Buyout/LBO [†]		06-May-2025	Completed
Hub International	Shields Insurance Agency	Buyout/LBO [†]		19-Jan-2021	Completed
Hub International	Swanson and Swanson Insurance	Buyout/LBO [†]		15-Jul-2024	Completed
Hub International	Fort Point Insurance Services	Buyout/LBO [†]		01-Nov-2012	Completed
Hub International	Garnett Retirement Group	Buyout/LBO [†]		07-Jan-2021	Completed
Hub International	Aegis Retirement Group	Buyout/LBO [†]		01-Jul-2021	Completed
Hub International	Epstein Financial	Buyout/LBO [†]		02-Jun-2021	Completed
Hub International	The Rubin Group	Buyout/LBO [†]		19-Sep-2018	Completed
Hub International	Wm. W. Hammond Insurance Agency	Buyout/LBO [†]		09-Jul-2018	Completed
Hub International	BCI Group	Buyout/LBO [†]		17-Mar-2017	Completed
Hub International	IBG Financial Partners	Buyout/LBO [†]		01-Apr-2021	Completed
Hub International	KeenanSuggs Insurance	Buyout/LBO [†]		26-Jul-2016	Completed
Hub International	Purselley Associates	Buyout/LBO [†]		20-Sep-2021	Completed
Hub International	Fidelity Associates	Buyout/LBO [†]		08-Jan-2015	Completed
Hub International	Great Basin Insurance	Buyout/LBO [†]		17-Dec-2024	Completed
Hub International	Raintree Insurance Agency	Buyout/LBO ^{†*}		06-Nov-2012	Completed
Hub International	Coast to Coast Insurance Brokers	Buyout/LBO [†]		10-Jan-2023	Completed
Hub International	Cooper, Simms, Nelson & Mosley	Buyout/LBO [†]		06-Jul-2015	Completed
Hub International	Midland Agency Insurance	Buyout/LBO [†]		11-Mar-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Direct Advisors	Buyout/LBO [†]		07-Sep-2022	Completed
Hub International	H.W. Hollinger	Buyout/LBO [†]		06-Oct-2021	Completed
Hub International	Vitolo	Buyout/LBO [†]		16-Nov-2020	Completed
Hub International	Basi Insurance Services	Buyout/LBO [†]		13-Dec-2021	Completed
Hub International	Dale Barton Agency	Buyout/LBO [†]		12-Dec-2022	Completed
Hub International	Finn & Stone	Buyout/LBO [†]		03-Mar-2021	Completed
Hub International	Ruhl & Ruhl Insurance	Buyout/LBO ^{†*}		23-Dec-2014	Completed
Hub International	The Ward Agency	Buyout/LBO ^{†*}		06-Aug-2018	Completed
Hub International	Creative Financial Strategies	Buyout/LBO [†]		07-Oct-2024	Completed
Hub International	Southern Colorado Insurance Center	Buyout/LBO [†]		07-Aug-2024	Completed
Hub International	Essex Agency	Buyout/LBO [†]		04-Jun-2024	Completed
Hub International	dElta Benefits	Buyout/LBO [†]		07-May-2018	Completed
Hub International	Sweet & Baker Insurance Brokers	Buyout/LBO [†]		04-Oct-2016	Completed
Hub International	Benefex Consulting	Buyout/LBO [†]		04-Feb-2020	Completed
Hub International	Patrion Insurance Services	Buyout/LBO ^{†*}		05-Jan-2012	Completed
Hub International	Shaver-Robichaux Agency	Buyout/LBO [†]		08-Jul-2022	Completed
Hub International	Regency Advisory Corporation	Buyout/LBO [†]		02-Oct-2019	Completed
Hub International	Del Fisher Insurance	Buyout/LBO [†]		02-Apr-2019	Completed
Hub International	McClements Insurance Services	Buyout/LBO [†]		19-Jul-2024	Completed
Hub International	Legacy Planning Partners	Buyout/LBO [†]		29-Jan-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	William R. Cargill Insurance Agency	Buyout/LBO [†]		06-May-2024	Completed
Hub International	Laubacher Insurance Agency	Buyout/LBO ^{†*}		05-Mar-2015	Completed
Hub International	Jones Retirement Plan Advisors	Buyout/LBO [†]		16-Oct-2018	Completed
Hub International	Alexander Insurance Agency	Buyout/LBO [†]		04-Feb-2015	Completed
Hub International	Davis Trachtenberg	Buyout/LBO [†]		08-Mar-2021	Completed
Hub International	Surety Services	Buyout/LBO ^{†*}		01-Dec-2017	Completed
Hub International	HB Consultants (Calgary)	Buyout/LBO [†]		03-Jun-2020	Completed
Hub International	Seymour Alper	Buyout/LBO [†]		02-Dec-2020	Completed
Hub International	Canadian Hail Agencies	Buyout/LBO [†]		23-Feb-2023	Completed
Hub International	Free Market Insurance Agency	Buyout/LBO [†]		02-Jul-2014	Completed
Hub International	Pinnacle Insurance Partners (Insurance Agency Business)	Buyout/LBO ^{†*}		03-Jan-2014	Completed
Hub International	Combined HCM	Buyout/LBO [†]		05-Jun-2024	Completed
Hub International	AM Insurance Services of Miami	Buyout/LBO [†]		08-Dec-2022	Completed
Hub International	Patrice Varin (Certain Assets)	Buyout/LBO [†]		04-Aug-2017	Completed
Hub International	MillsonJames	Buyout/LBO [†]		14-Jul-2017	Completed
Hub International	Guide Insurance Services	Buyout/LBO [†]		05-Oct-2022	Completed
Hub International	Fairfield County Bank Insurance Services	Buyout/LBO [†]		01-Dec-2024	Completed
Hub International	GMS Insurance	Buyout/LBO [†]		02-Mar-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	401(k) Advisors	Buyout/LBO [†]		06-Apr-2022	Completed
Hub International	Integrated Risk Solutions	Buyout/LBO [†]		14-Feb-2019	Completed
Hub International	Pete Webb Agency	Buyout/LBO [†]		09-Jul-2021	Completed
Hub International	Meyer & Rosenbaum	Buyout/LBO [†]		07-Apr-2025	Completed
Hub International	Benefit Partners Group (Certain Assets of Libertyville)	Buyout/LBO [†]		10-Dec-2021	Completed
Hub International	Jaimac Risk Management	Buyout/LBO [†]		12-Aug-2022	Completed
Hub International	BenefitsMart	Buyout/LBO [†]		08-Mar-2016	Completed
Hub International	Dwight W. Andrus Insurance (Assets in Louisiana)	Buyout/LBO [†]	\$190.00M	02-Mar-2023	Completed
Hub International	Gonzalez & Goenaga	Buyout/LBO [†]		12-Apr-2016	Completed
Hub International	Ion Insurance	Buyout/LBO [†]		10-May-2021	Completed
Hub International	D'Onofrio Insurance	Buyout/LBO [†]		13-Oct-2023	Completed
Hub International	Strategic Benefit Resources	Buyout/LBO [†]		09-Jan-2020	Completed
Hub International	Blair Jarcik Insurance	Buyout/LBO [†]		05-Dec-2019	Completed
Hub International	Niedermeyer Risk Management	Buyout/LBO [†]		09-Mar-2022	Completed
Hub International	Rhc Insurance Brokers	Buyout/LBO [†]		07-Jan-2020	Completed
Hub International	Raffa Financial Services	Buyout/LBO [†]		06-Jan-2022	Completed
Hub International	Prestige Wealth Partners (Florida)	Buyout/LBO [†]		08-May-2025	Completed
Hub International	Felton et Associes Assurances	Buyout/LBO [†]		09-Sep-2024	Completed
Hub International	Azur Consulting Services	Buyout/LBO [†]		10-Feb-2020	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Gus Bates Insurance & Investments	Buyout/LBO ^{†*}		06-Jul-2020	Completed
Hub International	Asset Protection Group (Midlothian)	Buyout/LBO [†]		16-Oct-2023	Completed
Hub International	Gold Sky Benefits	Buyout/LBO [†]		09-Dec-2021	Completed
Hub International	Nolen Associates	Buyout/LBO [†]		11-Dec-2018	Completed
Hub International	Incentive Systems	Buyout/LBO [†]		05-Mar-2021	Completed
Hub International	MMZ Associates	Buyout/LBO [†]		02-Jan-2015	Completed
Hub International	Liberty New Gate	Buyout/LBO [†]		04-Oct-2018	Completed
Hub International	Hobson Insurance	Buyout/LBO [†]		05-Apr-2023	Completed
Hub International	Advisory Businesses Of Quintes	Buyout/LBO [†]		06-Oct-2022	Completed
Hub International	Bubrig Insurance Agency	Buyout/LBO [†]		04-Aug-2022	Completed
Hub International	Doctors Insurance Services of New England	Buyout/LBO [†]		17-Aug-2015	Completed
Hub International	Wells Fargo Insurance (Crop Insurance Broker Business)	Buyout/LBO [†]		09-Nov-2017	Completed
Hub International	Livermore & Associates Insurance Services	Buyout/LBO [†]		01-Dec-2014	Completed
Hub International	Gamble Insurance	Buyout/LBO [†]		02-Jun-2015	Completed
Hub International	Harmony Insurance (Commercial Lines Insurance)	Buyout/LBO [†]		05-Apr-2016	Completed
Hub International	Lindenwood Agency	Buyout/LBO [†]		05-Feb-2025	Completed
Hub International	The Benefits Company	Buyout/LBO [†]		03-Apr-2018	Completed
Hub International	Golden Corner Wealth Advisors	Buyout/LBO [†]		07-Jul-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	EPIC Retirement Services Consulting	Buyout/LBO [†]		15-Aug-2019	Completed
Hub International	Shinstrom & Norman	Buyout/LBO [†]		10-Aug-2023	Completed
Hub International	Pippel Insurance Agency	Buyout/LBO [†]		05-Aug-2015	Completed
Hub International	Golden Ears Insurance Services	Buyout/LBO [†]		02-Aug-2023	Completed
Hub International	The Crichton Group	Buyout/LBO [†]		09-Jul-2019	Completed
Hub International	FirstBank Insurance Agency (certain assets)	Buyout/LBO [†]		03-Jun-2016	Completed
Hub International	Stellarus Benefits	Buyout/LBO [†]		11-Sep-2017	Completed
Hub International	Berk Bilgen Insurance	Buyout/LBO [†]		03-Jul-2019	Completed
Hub International	Western Growers Insurance Services (Retail Insurance Brokerage Business)	Buyout/LBO [†]		04-Nov-2024	Completed
Hub International	Mayfield Insurance	Buyout/LBO [†]		07-Feb-2025	Completed
Hub International	The Insurance Exchange (Insurance Brokers)	Buyout/LBO [†]		11-Mar-2019	Completed
Hub International	Tanna Insurance	Buyout/LBO [†]		01-Nov-2021	Completed
Hub International	Smith Watson Parker Insurance	Buyout/LBO [†]		05-Jan-2015	Completed
Hub International	Dansig	Buyout/LBO [†]		01-Mar-2025	Completed
Hub International	Johnston Lewis Associates	Buyout/LBO [†]		08-Jun-2023	Completed
Hub International	Forum Risques et Assurance	Buyout/LBO [†]		09-Jan-2019	Completed
Hub International	Insurance Management Associates (Annapolis)	Buyout/LBO [†]		02-Nov-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Sale Insurance Agency	Buyout/LBO [†]		03-Apr-2024	Completed
Hub International	Clearpoint Advisory Group	Buyout/LBO [†]		05-Oct-2020	Completed
Hub International	Kenneth A. Murray Insurance	Buyout/LBO [†]		09-Oct-2017	Completed
Hub International	MDW Insurance	Buyout/LBO [†]		01-Dec-2016	Completed
Hub International	Colton Insurance Associates	Buyout/LBO [†]		06-Jun-2017	Completed
Hub International	TAS Insurance Services	Buyout/LBO [†]		16-Jul-2024	Completed
Hub International	Rogers, Gunter, Vaughn	Buyout/LBO [†]		08-Aug-2017	Completed
Hub International	Wyoming Financial Insurance	Buyout/LBO [†]		07-Apr-2021	Completed
Hub International	Yavitz Insurance Group	Buyout/LBO [†]		10-Feb-2025	Completed
Hub International	Triester, Rossman and Associates	Buyout/LBO [†]		06-Feb-2020	Completed
Hub International	Charles R. Butler	Buyout/LBO [†]		08-Sep-2020	Completed
Hub International	Tri Line Agencies	Buyout/LBO [†]		07-Nov-2018	Completed
Hub International	The Clements Agency	Buyout/LBO [†]		08-Jun-2020	Completed
Hub International	Assured Risk Advisors	Buyout/LBO [†]		03-Aug-2023	Completed
Hub International	Jackson Hole Insurance	Buyout/LBO [†]		12-Dec-2024	Completed
Hub International	Trusted Capital Group	Buyout/LBO [†]		01-Jul-2021	Completed
Hub International	Employee Benefits Group	Buyout/LBO [†]		05-Nov-2015	Completed
Hub International	Hanson Insurance Group	Buyout/LBO [†]		03-May-2022	Completed
Hub International	Chatham Insurance Partners	Buyout/LBO [†]		14-Dec-2022	Completed
Hub International	KT&D	Buyout/LBO [†]		05-Aug-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Larry Dean Massey	Buyout/LBO [†]		12-Nov-2020	Completed
Hub International	Clarity Benefits Group	Buyout/LBO [†]		07-May-2019	Completed
Hub International	Newsura Insurance Services (Associated Property and Casualty Lines)	Buyout/LBO [†]		05-Nov-2019	Completed
Hub International	KC Insurance Group	Buyout/LBO [†]		05-Apr-2021	Completed
Hub International	True North Group Insurance Services	Buyout/LBO [†]		07-May-2024	Completed
Hub International	Weiss-Schantz Agency	Buyout/LBO [†]		13-Apr-2023	Completed
Hub International	Tri-Star Insurance Professionals	Buyout/LBO [†]		03-Mar-2017	Completed
Hub International	ES3 Advisory	Buyout/LBO [†]		01-Apr-2018	Completed
Hub International	Grace & Porta Benefits	Buyout/LBO [†]		27-Jul-2022	Completed
Hub International	IAS Associates	Buyout/LBO [†]		02-Oct-2015	Completed
Hub International	Flexible Benefits Plans	Buyout/LBO [†]		05-Sep-2024	Completed
Hub International	Williford Insurance Group	Buyout/LBO [†]		04-May-2022	Completed
Hub International	F.A.R.E. Healthcare	Buyout/LBO [†]		06-Sep-2023	Completed
Hub International	Benefit Broker Services	Buyout/LBO [†]		07-Aug-2018	Completed
Hub International	Dissinger Reed	Buyout/LBO [†]		16-Aug-2021	Completed
Hub International	Dunagan Associates (Employee Benefits Book-of-Business)	Buyout/LBO [†]		07-Aug-2015	Completed
Hub International	Baystate Fiduciary Advisors	Buyout/LBO [†]		11-Nov-2020	Completed
Hub International	Commercial Insurance Brokers	Buyout/LBO [†]		31-Dec-2020	Completed
Hub International	Wealthplan Advisors	Buyout/LBO [†]		03-Aug-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Graffam Insurance Group	Buyout/LBO [†]		17-Oct-2017	Completed
Hub International	SilverStone Group	Buyout/LBO [†]		04-Dec-2019	Completed
Hub International	Johnson & Wood Insurance Services	Buyout/LBO [†]		05-Oct-2015	Completed
Hub International	The Spofford Group	Buyout/LBO [†]		17-Dec-2021	Completed
Hub International	Fenner & Esler Agency	Buyout/LBO [†]		03-Jun-2025	Completed
Hub International	Group Benefit Specialists	Buyout/LBO [†]		13-Jul-2015	Completed
Hub International	HORAN Health	Buyout/LBO [†]		01-Jun-2023	Completed
Hub International	Compass Insurance Services	Buyout/LBO [†]		07-Jul-2022	Completed
Hub International	Steve Mariani Insurance	Buyout/LBO [†]		02-Aug-2017	Completed
Hub International	Saffe Property & Casualty (Houston Operations)	Buyout/LBO [†]		05-Apr-2018	Completed
Hub International	McNellis & Company	Buyout/LBO [†]		08-Sep-2021	Completed
Hub International	Pinnacle Financial Group	Buyout/LBO [†]		02-Dec-2016	Completed
Hub International	New Dimensions Underwriters	Buyout/LBO [†]		06-Sep-2016	Completed
Hub International	Delisle Agencies	Buyout/LBO [†]		13-Sep-2017	Completed
Hub International	Cosmo Insurance Service	Buyout/LBO [†]		05-Jan-2018	Completed
Hub International	Howitt Benefit Services	Buyout/LBO ^{†*}		08-Sep-2015	Completed
Hub International	Dadgar Insurance Agency	Buyout/LBO [†]		12-Dec-2018	Completed
Hub International	Western Growers Insurance Services	Buyout/LBO [†]		04-Nov-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Ivari (MGA business)	Buyout/LBO [†]		02-Jul-2020	Completed
Hub International	Integrated Benefits Group Insurance Brokerage	Buyout/LBO [†]		12-Jul-2024	Completed
Hub International	Preferred Benefits Services Agency	Buyout/LBO [†]		12-Jan-2021	Completed
Hub International	Insureon	Buyout/LBO [†]		01-Mar-2022	Completed
Hub International	Christiansen Insurance Group	Buyout/LBO [†]		11-Jan-2021	Completed
Hub International	Wyatt Insurance Services	Buyout/LBO [†]		10-Jul-2024	Completed
Hub International	Baldrice & Company	Buyout/LBO ^{†*}		04-Feb-2014	Completed
Hub International	Insure All	Buyout/LBO [†]		01-Nov-2020	Completed
Hub International	Bernstein Insurance	Buyout/LBO [†]		07-Oct-2020	Completed
Hub International	Briargate Insurance Services	Buyout/LBO ^{†*}		08-Jan-2020	Completed
Hub International	Associated Insurance Group (Missouri)	Buyout/LBO [†]		08-Oct-2024	Completed
Hub International	Invensure Insurance Brokers	Buyout/LBO [†]		01-Dec-2022	Completed
Hub International	Scarborough Company Insurance	Buyout/LBO [†]		03-May-2017	Completed
Hub International	Contractor's Services	Buyout/LBO [†]		01-Dec-2017	Completed
Hub International	Colorado Nonprofit Insurance Agency	Buyout/LBO [†]		06-Aug-2015	Completed
Hub International	Proteus Performance Management	Buyout/LBO [†]		05-Nov-2018	Completed
Hub International	Integro (Canada)	Buyout/LBO [†]		01-Sep-2017	Completed
Hub International	Rogersworks	Buyout/LBO [†]		18-Oct-2021	Completed
Hub International	RiteHealth Solutions	Buyout/LBO [†]		19-Mar-2019	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Hub International	Baker and Associates (Alaska)	Buyout/LBO [†]		03-Oct-2017	Completed
Hub International	Horizon Insurance	Buyout/LBO [†]		09-Aug-2023	Completed
Hub International	Essex Insurance & Travel	Buyout/LBO ^{†*}		07-Apr-2014	Completed
Hub International	Desilets Insurance Brokers	Buyout/LBO [†]		07-Mar-2018	Completed
Hub International	Pallister Insurance Brokers	Buyout/LBO ^{†*}		04-Nov-2013	Completed
Hub International	Flather & Perkins	Buyout/LBO [†]		23-May-2018	Completed
Hub International	Fox-Everett	Buyout/LBO [†]		01-Jun-2014	Completed
Hub International	In-Fi	Buyout/LBO [†]		14-Jun-2019	Completed
Hub International	Jamie Campbell Younger (Insurance Book of Business)	Buyout/LBO [†]		03-Nov-2016	Completed
Hub International	Marketing Management Associates	Buyout/LBO [†]		08-Apr-2022	Completed
Hub International	E-Insure Services	Buyout/LBO [†]		07-Jun-2023	Completed
Hub International Insurance Services	Cretcher Heartland	Buyout/LBO [†]		06-Aug-2019	Completed
HUB International Midwest	Corporate Benefits Advisors	Buyout/LBO [†]		05-Mar-2014	Completed
Hutchison Whampoa	T-Mobile US	Spin-Off		01-Apr-1999	Completed
Iconic Private Equity Partners	eTapestry.com	Buyout/LBO [†]	\$25.42M	01-Aug-2007	Completed
Idealab	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
Idinvest Partners	Falck Alarm	Buyout/LBO [†]		03-Oct-2016	Completed
Idinvest Partners	Verisure	Buyout/LBO	\$4.70B	06-Oct-2015	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Idinvest Partners	Arlo (European Commercial Operations)	Buyout/LBO [†]	\$50.00M	02-Jan-2020	Completed
ImageRight	Computers by Design	Buyout/LBO [†]		03-Oct-2007	Completed
Impact Assets	Ignite Reading	Early Stage VC	\$10.00M	17-Jan-2023	Completed
Insight Partners (New York)	Dustico	Buyout/LBO [†]		05-Aug-2021	Completed
Integral Capital Partners	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed
Intergraph	COADE	Buyout/LBO ^{†*}		06-Jan-2010	Completed
Intergraph	Technische Comp Systeme Süssen (Elec Eng Software Business)	Buyout/LBO ^{†*}		05-Nov-2009	Completed
Intergraph	GISquadrat (Software Operations)	Buyout/LBO [†]		10-Apr-2007	Completed
Intergraph	TechServer	Buyout/LBO [†]		06-May-2008	Completed
Intermediate Capital Group	AliasLab	Buyout/LBO [†]		01-Dec-2016	Completed
Intermediate Capital Group	NetLex (Rome)	Buyout/LBO [†]		01-Apr-2017	Completed
Intermediate Capital Group	e-conomic	Buyout/LBO [†]		17-Jun-2016	Completed
Internet Brands	Weddingbee.com	Buyout/LBO ^{†*}		11-Jul-2011	Completed
Internet Brands	JustMommies.com	Buyout/LBO ^{†*}		11-Jul-2011	Completed
Internet Brands	Inhabitat	Buyout/LBO ^{†*}		07-Sep-2011	Completed
Internet Brands	Accounting Jobs Today	Buyout/LBO ^{†*}		28-Apr-2011	Completed
Internet Brands	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
Internet Brands	gtr.co.uk	Buyout/LBO [†]		27-Oct-2011	Completed
Internet Brands	iMatrix	Buyout/LBO [†]		06-Jan-2014	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Internet Brands	F150 Forums	Buyout/LBO ^{†*}		02-Apr-2012	Completed
Internet Brands	SatisFacts Research	Buyout/LBO ^{†*}		28-Jun-2012	Completed
Internet Brands	Promotional Codes	Buyout/LBO [†]		01-Jan-2011	Completed
Internet Brands	Forum Runner	Buyout/LBO ^{†*}		07-Mar-2012	Completed
Internet Brands	Vertical Alliance Group (Website Assets)	Buyout/LBO ^{†*}		28-Apr-2011	Completed
Internet Brands	Frugal Travel Guy	Buyout/LBO ^{†*}		20-Jan-2012	Completed
Internet Brands	DieselBombers.com	Buyout/LBO [†]		25-Oct-2011	Completed
Internet Brands	Sites-Canada	Buyout/LBO [†]		01-May-2013	Completed
Internet Brands	Nolo	Buyout/LBO ^{†*}		02-May-2011	Completed
Internet Brands	5series.net	Buyout/LBO [†]		25-Oct-2011	Completed
Investcorp	Sharebridge Private Equity Consolidated	PE Growth/Expansion		17-Dec-2008	Completed
Investor	Nasdaq	PE Growth/Expansion [*]	\$5.13M	12-Nov-2001	Completed
IRIS Software Group	5 Star Computer Systems	Buyout/LBO ^{†*}		18-Aug-2008	Completed
IRIS Software Group	PROJECTminder	Buyout/LBO [†]		01-Jan-2009	Completed
IRIS Software Group	Phroot	Buyout/LBO [†]		01-Jul-2013	Completed
IRIS Software Group	ATW Information Technology Systems	Buyout/LBO [†]		01-Jan-2009	Completed
IRIS Software Group	Drummohr Technology	Buyout/LBO [†]		01-May-2008	Completed
JMI Equity	Risk Handler Software	Buyout/LBO [†]		06-Dec-2022	Completed
JMI Equity	EZLynx	Buyout/LBO [†]		09-Mar-2021	Completed
JMI Equity	COADE	Buyout/LBO [†]		06-Jan-2010	Completed
JMI Equity	Ellucian	Buyout/LBO [*]	\$570.00M	10-Dec-2009	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
JMI Equity	Immedis	Buyout/LBO [†]	\$550.00M	01-Jul-2023	Completed
JMI Equity	Sites-Canada	Buyout/LBO [†]		01-May-2013	Completed
JMI Equity	InStar	Buyout/LBO [†]		21-Jun-2005	Completed
JMI Equity	Internet Brands	Buyout/LBO	\$640.00M	17-Dec-2010	Completed
JMI Equity	EverythingBenefits	Buyout/LBO [†]		01-Jun-2021	Completed
JMI Equity	Ascentis	Buyout/LBO [†]		09-Mar-2022	Completed
JMI Equity	Great Place to Work Institute	Buyout/LBO [†]		01-Sep-2021	Completed
JMI Equity	DieselBombers.com	Buyout/LBO [†]		25-Oct-2011	Completed
JMI Equity	IS2 (eTrading Platform)	Buyout/LBO [†]		29-Sep-2016	Completed
JMI Equity	Quorbit	Buyout/LBO [†]		03-Nov-2022	Completed
JMI Equity	TechServer	Buyout/LBO [†]		06-May-2008	Completed
JMI Equity	EvoSure	Buyout/LBO [†]		01-Sep-2015	Completed
JMI Equity	Semcat	Buyout/LBO [†]		16-Jun-2015	Completed
JMI Equity	Sircon	Buyout/LBO [†]		01-Jul-2008	Completed
JMI Equity	Activant Solutions	Buyout/LBO	\$785.00M	03-May-2006	Completed
JMI Equity	CampusIT	Buyout/LBO [†]		20-Jan-2014	Completed
JMI Equity	Tarmika	Buyout/LBO [†]		12-Aug-2022	Completed
JMI Equity	gtr.co.uk	Buyout/LBO [†]		27-Oct-2011	Completed
JMI Equity	DoubleClick	Buyout/LBO	\$1.07B	13-Jul-2005	Completed
JMI Equity	Kronos SaaShr	Buyout/LBO [†]		28-Mar-2012	Completed
JMI Equity	Helix Education	Buyout/LBO [†]		13-Apr-2015	Completed
JMI Equity	Time Link International	Buyout/LBO [†]		20-Aug-2013	Completed
JMI Equity	Accounting Jobs Today	Buyout/LBO [†]		28-Apr-2011	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
JMI Equity	Audacious Inquiry	Buyout/LBO [†]	\$316.70M	16-Mar-2022	Completed
JMI Equity	Principal Decision Systems International	Buyout/LBO [†]		02-May-2011	Completed
JMI Equity	Cytora	Buyout/LBO [†]		09-Sep-2025	Completed
JMI Equity	Activant Silk Systems	Buyout/LBO [†]	\$6.90M	31-May-2007	Completed
JMI Equity	Mitchell ClaimIQ	Buyout/LBO [†]		13-Sep-2005	Completed
JMI Equity	Inhabitat	Buyout/LBO [†]		07-Sep-2011	Completed
JMI Equity	Promotional Codes	Buyout/LBO [†]		01-Jan-2011	Completed
JMI Equity	Forum Runner	Buyout/LBO [†]		07-Mar-2012	Completed
JMI Equity	Smart Computer Holdings	Buyout/LBO [†]		17-Apr-2012	Completed
JMI Equity	JustMommies.com	Buyout/LBO [†]		11-Jul-2011	Completed
JMI Equity	Nolo	Buyout/LBO [†]		02-May-2011	Completed
JMI Equity	DoubleClick Rich Media and Video	Buyout/LBO [†]		28-Jun-2006	Completed
JMI Equity	Vulcan Solutions (insurtech division)	Buyout/LBO [†]		01-Jan-2017	Completed
JMI Equity	Captor Group	Buyout/LBO [†]		13-Jun-2007	Completed
JMI Equity	Enlyte Group	Buyout/LBO	\$239.70M	22-Feb-2000	Completed
JMI Equity	SpotCues	Buyout/LBO [†]		01-Jan-2022	Completed
JMI Equity	BCF Technology (Software Solutions)	Buyout/LBO [†]		12-Jul-2006	Completed
JMI Equity	Vertical Alliance Group (Website Assets)	Buyout/LBO [†]		28-Apr-2011	Completed
JMI Equity	FinancePro	Buyout/LBO [†]		16-Mar-2006	Completed
JMI Equity	NxTech	Buyout/LBO [†]		07-Jan-2015	Completed
JMI Equity	Vertafore	Buyout/LBO	\$400.00M	22-Dec-2004	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
JMI Equity	Planck	Buyout/LBO [†]		23-Jul-2024	Completed
JMI Equity	PointClickCare	Secondary Transaction - Private		22-Apr-2022	Completed
JMI Equity	American HealthTech	Buyout/LBO [†]		16-Jan-2024	Completed
JMI Equity	TechCanary	Buyout/LBO [†]		10-Apr-2019	Completed
JMI Equity	Eclipse (IT Consulting and Outsourcing)	Buyout/LBO [†]	\$100.50M	17-Aug-2007	Completed
JMI Equity	Intergraph	Buyout/LBO	\$1.30B [£]	29-Nov-2006	Completed
JMI Equity	5series.net	Buyout/LBO [†]		25-Oct-2011	Completed
JMI Equity	Accu Med Technology Solutions	Buyout/LBO [†]		08-Oct-2012	Completed
JMI Equity	Stromberg	Buyout/LBO [†]	\$13.60M	14-Oct-2009	Completed
JMI Equity	Frugal Travel Guy	Buyout/LBO [†]		20-Jan-2012	Completed
JMI Equity	Optimum Solutions (Nashville)	Buyout/LBO [†]		02-Oct-2019	Completed
JMI Equity	Applied Systems	Buyout/LBO	\$1.80B	24-Jan-2014	Completed
JMI Equity	Interboro Systems Corporation	Buyout/LBO [†]		01-Jan-2022	Completed
JMI Equity	Technische Comp Systeme Süßen (Elec Eng Software Business)	Buyout/LBO [†]		05-Nov-2009	Completed
JMI Equity	Relay Software	Buyout/LBO [†]		29-Jul-2016	Completed
JMI Equity	Deploy Solutions	Buyout/LBO [†]		31-Oct-2007	Completed
JMI Equity	iMatrix	Buyout/LBO [†]		06-Jan-2014	Completed
JMI Equity	Patient Pattern	Buyout/LBO [†]		13-Mar-2023	Completed
JMI Equity	Tangozebra	Buyout/LBO [†]	\$15.00M	01-Mar-2007	Completed
JMI Equity	WebApps	Buyout/LBO [†]		28-Mar-2012	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
JMI Equity	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
JMI Equity	UKG	Buyout/LBO	\$1.80B [£]	13-Jun-2007	Completed
JMI Equity	Blackbaud	Buyout/LBO		19-Oct-1999	Completed
JMI Equity	Ensera	Buyout/LBO [†]	\$14.00M	24-Sep-2001	Completed
JMI Equity	Weddingbee.com	Buyout/LBO [†]		11-Jul-2011	Completed
JMI Equity	Empower Software Solutions	Buyout/LBO [†]		14-Jan-2016	Completed
JMI Equity	OptiLink	Buyout/LBO [†]		20-Jan-2012	Completed
JMI Equity	F150 Forums	Buyout/LBO [†]		02-Apr-2012	Completed
JMI Equity	SatisFacts Research	Buyout/LBO [†]		28-Jun-2012	Completed
JMI Equity	Custom Insurance Solutions	Buyout/LBO [†]		03-Feb-2005	Completed
JMI Equity	Indio Technologies	Buyout/LBO [†]		05-Dec-2019	Completed
JMI Equity	Policy Works	Buyout/LBO [†]		15-Oct-2019	Completed
JMI Equity	Shiftboard	Buyout/LBO [†]		30-May-2025	Completed
JMI Equity	Datamatics Management Services	Buyout/LBO [†]		25-Oct-2016	Completed
John Doerr	Well (Other Healthcare Technology Systems)	Early Stage VC	\$25.00M	14-Nov-2019	Completed
John Doerr	Well (Other Healthcare Technology Systems)	Early Stage VC	\$50.93M	17-Mar-2021	Completed
J.P. Morgan (New York)	Formula One World Championship	Buyout/LBO	\$600.00M	01-Mar-2001	Completed
K1 Investment Management	Dustico	Buyout/LBO [†]		05-Aug-2021	Completed
Kenneth Griffin	Ignite Reading	Early Stage VC	\$10.00M	17-Jan-2023	Completed
KinderCare Learning Companies	Embanet	Later Stage VC		02-Aug-2007	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Kleiner Perkins	Upromise	Early Stage VC	\$55.00M	06-Nov-2000	Completed
Kleiner Perkins	EquiClaim	Buyout/LBO [†]	\$41.00M	03-May-2011	Completed
Kohlberg Kravis Roberts	Puzzle Medical Devices	Later Stage VC	\$25.00M	07-Feb-2023	Completed
Kohlberg Kravis Roberts	Cordis	Buyout/LBO	\$1.00B	02-Aug-2021	Completed
Kohlberg Kravis Roberts	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
Kohlberg Kravis Roberts	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
Kohlberg Kravis Roberts	Texas Genco	Buyout/LBO	\$3.65B	13-Apr-2005	Completed
Kohlberg Kravis Roberts	The Nielsen Company	PE Growth/Expansion	\$10.00B	17-Dec-2007	Completed
Kohlberg Kravis Roberts	KoreanClick	Buyout/LBO [†]		09-Sep-2009	Completed
Kohlberg Kravis Roberts	Radio & Records	Buyout/LBO [†]		01-Aug-2006	Completed
Kohlberg Kravis Roberts	Nielsen IAG	Buyout/LBO [†]	\$223.00M	16-May-2008	Completed
Kohlberg Kravis Roberts	Telephia	Buyout/LBO [†]	\$440.00M	10-Aug-2007	Completed
Kohlberg Kravis Roberts	USP Market Intelligence	Buyout/LBO [†]		08-Feb-2010	Completed
Kohlberg Kravis Roberts	MedAlliance (Drug Delivery)	Buyout/LBO [†]	\$1.14B	01-Jan-2023	Completed
Kohlberg Kravis Roberts	Cortex (Healthcare Technology Systems)	PE Growth/Expansion	\$133.00M	07-Dec-2023	Completed
Kohlberg Kravis Roberts	Media Instruments	Buyout/LBO [†]		26-Mar-2010	Completed
Kohlberg Kravis Roberts	Affinova	Buyout/LBO [†]		29-Oct-2014	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Kohlberg Kravis Roberts	GlanceGuide	Buyout/LBO [†]		04-May-2010	Completed
Kohlberg Kravis Roberts	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
Kohlberg Kravis Roberts	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed
Kohlberg Kravis Roberts	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed
Kohlberg Kravis Roberts	vBrand	Buyout/LBO [†]		03-Aug-2017	Completed
Krauter & Company	Sharebridge Private Equity Consolidated	PE Growth/Expansion		17-Dec-2008	Completed
Lagardère	C More Entertainment	PE Growth/Expansion			Completed
L Capital	Exceed.AI	Buyout/LBO [†]	\$35.00M	01-Dec-2021	Completed
L Capital	Pointillist	Buyout/LBO [†]	\$150.00M	01-Dec-2021	Completed
L Capital	Silver Lining Solutions	Buyout/LBO [†]		27-Feb-2017	Completed
L Capital	Interactive Intelligence Group	Buyout/LBO [†]	\$1.40B	01-Dec-2016	Completed
LDC	Phroot	Buyout/LBO [†]		01-Jul-2013	Completed
LDC	PROJECTminder	Buyout/LBO [†]		01-Jan-2009	Completed
LDC	Drummohr Technology	Buyout/LBO [†]		01-May-2008	Completed
LDC	ATW Information Technology Systems	Buyout/LBO [†]		01-Jan-2009	Completed
Lead Edge Capital	Interboro Systems Corporation	Buyout/LBO [†]		01-Jan-2022	Completed
Lead Edge Capital	Shiftboard	Buyout/LBO [†]		30-May-2025	Completed
Lead Edge Capital	Great Place to Work Institute	Buyout/LBO [†]		01-Sep-2021	Completed
Lead Edge Capital	Immedis	Buyout/LBO [†]	\$550.00M	01-Jul-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Lead Edge Capital	Quorbit	Buyout/LBO [†]		03-Nov-2022	Completed
Lead Edge Capital	Ascentis	Buyout/LBO [†]		09-Mar-2022	Completed
Leonard Green & Partners	Woods Insurance Service	Buyout/LBO [†]		31-Dec-2024	Completed
Leonard Green & Partners	Symphony Financial & Insurance Services	Buyout/LBO [†]		06-Jun-2024	Completed
Leonard Green & Partners	Meyers Glaros	Buyout/LBO [†]		10-Jun-2024	Completed
Leonard Green & Partners	Tatman's Carstar	Buyout/LBO [†]		10-Dec-2021	Completed
Leonard Green & Partners	Essex Agency	Buyout/LBO [†]		04-Jun-2024	Completed
Leonard Green & Partners	Global Ag Risk Solutions	Buyout/LBO [†]		05-Nov-2024	Completed
Leonard Green & Partners	Insurance Management Company	Buyout/LBO [†]		06-Aug-2024	Completed
Leonard Green & Partners	Hadfield Agency	Buyout/LBO [†]		09-Dec-2024	Completed
Leonard Green & Partners	Allegiant Global Partners	Buyout/LBO [†]		05-May-2025	Completed
Leonard Green & Partners	CoverWallet (Certain Assets in United States)	Buyout/LBO [†]	\$38.00M	30-Sep-2023	Completed
Leonard Green & Partners	Fairfield County Bank Insurance Services	Buyout/LBO [†]		01-Dec-2024	Completed
Leonard Green & Partners	Dansig	Buyout/LBO [†]		01-Mar-2025	Completed
Leonard Green & Partners	Jordan Sibler (Retirement and Private Wealth Books of Business)	Buyout/LBO [†]		07-Mar-2025	Completed
Leonard Green & Partners	2197747 Alberta Ltd (Certain Assets in Alberta)	Buyout/LBO [†]		08-May-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Leonard Green & Partners	AutoNation (17 Collision Centers)	Buyout/LBO [†]		12-Oct-2021	Completed
Leonard Green & Partners	Miv Insurance	Buyout/LBO [†]		05-Mar-2025	Completed
Leonard Green & Partners	Lindenwood Agency	Buyout/LBO [†]		05-Feb-2025	Completed
Leonard Green & Partners	Western Growers Insurance Services	Buyout/LBO [†]		04-Nov-2024	Completed
Leonard Green & Partners	2837932 Ontario	Buyout/LBO [†]		17-Jul-2024	Completed
Leonard Green & Partners	Meyer & Rosenbaum	Buyout/LBO [†]		07-Apr-2025	Completed
Leonard Green & Partners	Fenner & Esler Agency	Buyout/LBO [†]		03-Jun-2025	Completed
Leonard Green & Partners	Employee Benefit Associates	Buyout/LBO [†]		08-Apr-2025	Completed
Leonard Green & Partners	Western Growers Insurance Services (Retail Insurance Brokerage Business)	Buyout/LBO [†]		04-Nov-2024	Completed
Leonard Green & Partners	Flexible Benefits Plans	Buyout/LBO [†]		05-Sep-2024	Completed
Leonard Green & Partners	Auto Body Innovations	Buyout/LBO [†]		19-Oct-2023	Completed
Leonard Green & Partners	Integrated Benefits Group Insurance Brokerage	Buyout/LBO [†]		12-Jul-2024	Completed
Leonard Green & Partners	Fifth Avenue Agency	Buyout/LBO [†]		16-May-2025	Completed
Leonard Green & Partners	Great Basin Insurance	Buyout/LBO [†]		17-Dec-2024	Completed
Leonard Green & Partners	Yavitz Insurance Group	Buyout/LBO [†]		10-Feb-2025	Completed
Leonard Green & Partners	D'Onofrio Insurance	Buyout/LBO [†]		13-Oct-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Leonard Green & Partners	Mayfield Insurance	Buyout/LBO [†]		07-Feb-2025	Completed
Leonard Green & Partners	True North Group Insurance Services	Buyout/LBO [†]		07-May-2024	Completed
Leonard Green & Partners	Sale Insurance Agency	Buyout/LBO [†]		03-Apr-2024	Completed
Leonard Green & Partners	Claritev	Buyout/LBO	\$7.50B	01-Jun-2016	Completed
Leonard Green & Partners	Wade Associates	Buyout/LBO [†]		22-Jul-2024	Completed
Leonard Green & Partners	TAS Insurance Services	Buyout/LBO [†]		16-Jul-2024	Completed
Leonard Green & Partners	Clark 401k Consulting	Buyout/LBO [†]		08-Aug-2024	Completed
Leonard Green & Partners	Southern Colorado Insurance Center	Buyout/LBO [†]		07-Aug-2024	Completed
Leonard Green & Partners	Creative Financial Strategies	Buyout/LBO [†]		07-Oct-2024	Completed
Leonard Green & Partners	Prestige Wealth Partners (Florida)	Buyout/LBO [†]		08-May-2025	Completed
Leonard Green & Partners	Herb's Paint & Body	Buyout/LBO [†]		05-Aug-2019	Completed
Leonard Green & Partners	McClements Insurance Services	Buyout/LBO [†]		19-Jul-2024	Completed
Leonard Green & Partners	WestStar Insurance	Buyout/LBO [†]		09-Oct-2024	Completed
Leonard Green & Partners	Associated Insurance Group (Missouri)	Buyout/LBO [†]		08-Oct-2024	Completed
Leonard Green & Partners	Preferred Services Group	Buyout/LBO [†]		06-Mar-2024	Completed
Leonard Green & Partners	Wycoff Insurance Agency	Buyout/LBO [†]		05-Jun-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Leonard Green & Partners	Guru of Insurance	Buyout/LBO [†]		06-May-2025	Completed
Leonard Green & Partners	Price's Collision Centers	Buyout/LBO [†]		09-Apr-2019	Completed
Leonard Green & Partners	William R. Cargill Insurance Agency	Buyout/LBO [†]		06-May-2024	Completed
Leonard Green & Partners	Legacy Planning Partners	Buyout/LBO [†]		29-Jan-2025	Completed
Leonard Green & Partners	Asset Protection Group (Midlothian)	Buyout/LBO [†]		16-Oct-2023	Completed
Leonard Green & Partners	Swanson and Swanson Insurance	Buyout/LBO [†]		15-Jul-2024	Completed
Leonard Green & Partners	Demarie Insurance Agency	Buyout/LBO [†]		07-May-2025	Completed
Leonard Green & Partners	Skinner & Company	Buyout/LBO [†]		01-Jul-2024	Completed
Leonard Green & Partners	Felton et Associes Assurances	Buyout/LBO [†]		09-Sep-2024	Completed
Leonard Green & Partners	Drayton Valley Insurance Agency	Buyout/LBO [†]		06-Mar-2025	Completed
Leonard Green & Partners	Otter Insurance Agency	Buyout/LBO [†]		11-Dec-2024	Completed
Leonard Green & Partners	Anco Insurance Managers	Buyout/LBO [†]		11-Nov-2024	Completed
Leonard Green & Partners	Jackson Hole Insurance	Buyout/LBO [†]		12-Dec-2024	Completed
Leonard Green & Partners	R.K. Gore & Associates	Buyout/LBO [†]		13-Nov-2024	Completed
Leonard Green & Partners	Henriott Group	Buyout/LBO [†]		01-Apr-2025	Completed
Leonard Green & Partners	DAR The Rocchio Agency	Buyout/LBO [†]		06-Feb-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Leonard Green & Partners	Merriwether & Williams Insurance Services	Buyout/LBO [†]		02-May-2024	Completed
Leonard Green & Partners	Scott Held Insurance Agency	Buyout/LBO [†]		04-Jun-2025	Completed
Leonard Green & Partners	Nagys Collision Centers(10 Locations)	Buyout/LBO [†]		01-Jan-2019	Completed
Leonard Green & Partners	Veripax Wealth Management	Buyout/LBO [†]		09-Jun-2025	Completed
Leonard Green & Partners	Pollock Insurance	Buyout/LBO [†]		04-Apr-2024	Completed
Leonard Green & Partners	Combined HCM	Buyout/LBO [†]		05-Jun-2024	Completed
Leonard Green & Partners	Byrnes Agency Insurance	Buyout/LBO [†]		09-Jan-2025	Completed
Leonard Green & Partners	Great Basin Insurance Eugene	Buyout/LBO [†]		04-Oct-2023	Completed
Leonard Green & Partners	Wyatt Insurance Services	Buyout/LBO [†]		10-Jul-2024	Completed
LocalTapiola	9Lives Kotipalvelut	Buyout/LBO [†]		29-May-2025	Completed
LocalTapiola	MediGroup	Buyout/LBO [†]		01-Apr-2025	Announced/In Progress
LocalTapiola	Regina Maria	Buyout/LBO [†]	\$1.10B	01-Apr-2025	Completed
London Merchant Securities	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed
LPL Financial Holdings	Aplifi	PE Growth/Expansion		11-Jun-2007	Completed
LPL Financial Holdings	Independent Financial Marketing Group	Buyout/LBO [†]	\$25.69M	05-Sep-2007	Completed
LPL Financial Holdings	National Retirement Partners	Buyout/LBO ^{†*}	\$25.30M	09-Feb-2011	Completed
LPL Financial Holdings	UVEST Financial Services	Buyout/LBO [†]	\$89.45M	02-Jan-2007	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
LPL Financial Holdings	LPL Independent Advisor Services Group	Buyout/LBO [†]	\$120.48M	20-Jun-2007	Completed
Massena Partners	Verisure	Buyout/LBO	\$2.38B	01-Sep-2011	Completed
Massena Partners	Patroll International	Buyout/LBO [†]	\$3.50M [£]	22-Apr-2014	Completed
MassVentures	Captor Group	Buyout/LBO [†]		13-Jun-2007	Completed
Mayfield Fund	Adchemy	Later Stage VC	\$19.00M	01-Jan-2008	Completed
MC Capital Europe	Nexant	Later Stage VC		01-Jan-2007	Completed
MecklerMedia	Inside Network	Buyout/LBO [†]	\$14.00M	12-May-2011	Completed
Medline Industries	United Medco	Buyout/LBO [†]		10-Jan-2024	Completed
Medline Industries	Ecolab (Global Surgical Solutions)	Buyout/LBO [†]	\$950.00M	01-Aug-2024	Completed
Medline Industries	Medisiss	Buyout/LBO [†]		01-Jan-2012	Completed
Medline Industries	Stat Health Care	Buyout/LBO [†]		11-Jan-2023	Completed
Medline Industries	PrefConnect	Buyout/LBO [†]		21-Sep-2023	Completed
Medline Industries	AG Cuffill	Buyout/LBO [†]		07-Mar-2024	Completed
Mehiläinen	Regina Maria	Buyout/LBO [†]	\$1.10B	01-Apr-2025	Completed
Mehiläinen	9Lives Kotipalvelut	Buyout/LBO [†]		29-May-2025	Completed
Mehiläinen	MediGroup	Buyout/LBO [†]		01-Apr-2025	Announced/In Progress
Mercury Italy	Nexi	Buyout/LBO	\$2.20B	18-Dec-2015	Completed
Morgan Stanley	LPL Financial Holdings	Buyout/LBO	\$1.50B	28-Dec-2005	Completed
Morgan Stanley	LPL Independent Advisor Services Group	Buyout/LBO [†]	\$120.48M	20-Jun-2007	Completed
Morgan Stanley Expansion Capital	Nexant	Later Stage VC		01-Jan-2007	Completed
Mosaic Health Solutions	Well (Other Healthcare Technology Systems)	Early Stage VC	\$50.93M	17-Mar-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Mosaic Health Solutions	Well (Other Healthcare Technology Systems)	Early Stage VC	\$25.00M	14-Nov-2019	Completed
Mountain Partners	Scout24	Buyout/LBO	\$2.00B	01-Feb-2014	Completed
Mubadala Investment Company	Herrmann & Cooke Wealth Management	Buyout/LBO [†]		05-Oct-2022	Completed
Mubadala Investment Company	New England Pension Plan Systems	Buyout/LBO [†]		14-Dec-2023	Completed
Mubadala Investment Company	Cahill Wealth Management	Buyout/LBO [†]		05-May-2025	Completed
Mubadala Investment Company	Soundmark Wealth Management	Buyout/LBO [†]		13-May-2024	Completed
Mubadala Investment Company	PRW Wealth Management	Buyout/LBO [†]		16-Nov-2023	Completed
Mubadala Investment Company	Edelman Financial Engines	PE Growth/Expansion		14-Apr-2021	Completed
Mubadala Investment Company	Align Wealth Management	Buyout/LBO [†]		03-Oct-2023	Completed
Nautic Partners	Ascentis	Buyout/LBO [†]		09-Mar-2022	Completed
Nautic Partners	Interboro Systems Corporation	Buyout/LBO [†]		01-Jan-2022	Completed
Nets	Poplatek Payments	Buyout/LBO [†]		23-Dec-2019	Completed
Nets	Poplatek (Espoo)	Buyout/LBO [†]		23-Dec-2019	Completed
Nets	eCard	Buyout/LBO [†]	\$73.00M	04-Jan-2019	Completed
Nets	Concardis	Buyout/LBO [†]		07-Jan-2019	Completed
Nets	Przelewy24	Buyout/LBO [†]		02-Aug-2019	Completed
Nets	Polskie ePłatności	Buyout/LBO [†]	\$500.00M	14-Oct-2020	Completed
Nets	CCV Schweiz	Buyout/LBO [†]		21-Oct-2020	Completed
New Mountain Capital	Golf Datatech	Buyout/LBO [†]		31-Jan-2024	Completed
New Mountain Capital	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Northleaf Capital Partners	National Home Warranty Group	Buyout/LBO [†]		04-Oct-2021	Completed
Northleaf Capital Partners	HORAN Health	Buyout/LBO [†]		01-Jun-2023	Completed
Northleaf Capital Partners	Dale Barton Agency	Buyout/LBO [†]		12-Dec-2022	Completed
Northleaf Capital Partners	Jerry Baird Insurance Agency	Buyout/LBO [†]		11-Oct-2021	Completed
Northleaf Capital Partners	HUB Retirement and Wealth Management	Buyout/LBO [†]		04-Sep-2019	Completed
Northleaf Capital Partners	Priority Insurance Associates	Buyout/LBO [†]		03-Nov-2022	Completed
Northleaf Capital Partners	GRP Financial California	Buyout/LBO [†]		14-Dec-2021	Completed
Northleaf Capital Partners	Galon Insurance Brokers	Buyout/LBO [†]		02-Feb-2021	Completed
Northleaf Capital Partners	Glacier Insurance of Libby	Buyout/LBO [†]		03-Mar-2023	Completed
Northleaf Capital Partners	Canadian Hail Agencies	Buyout/LBO [†]		23-Feb-2023	Completed
Northleaf Capital Partners	Health Insurance Consultants	Buyout/LBO [†]		08-Jun-2023	Completed
Northleaf Capital Partners	Guide Insurance Services	Buyout/LBO [†]		05-Oct-2022	Completed
Northleaf Capital Partners	AM Insurance Services of Miami	Buyout/LBO [†]		08-Dec-2022	Completed
Northleaf Capital Partners	Gregory Benefits & Consulting	Buyout/LBO [†]		08-Dec-2021	Completed
Northleaf Capital Partners	Tilghman Insurance of Myrtle Beach	Buyout/LBO [†]		08-Sep-2022	Completed
Northleaf Capital Partners	Benefit Strategies Agency	Buyout/LBO [†]		04-Mar-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Northleaf Capital Partners	Benefit Partners Group (Certain Assets of Libertyville)	Buyout/LBO [†]		10-Dec-2021	Completed
Northleaf Capital Partners	Jaimac Risk Management	Buyout/LBO [†]		12-Aug-2022	Completed
Northleaf Capital Partners	GJJK	Buyout/LBO [†]		07-Sep-2023	Completed
Northleaf Capital Partners	Dwight W. Andrus Insurance (Assets in Louisiana)	Buyout/LBO [†]	\$190.00M	02-Mar-2023	Completed
Northleaf Capital Partners	Strategic Benefit Resources	Buyout/LBO [†]		09-Jan-2020	Completed
Northleaf Capital Partners	Horizon Agency	Buyout/LBO [†]		04-Apr-2023	Completed
Northleaf Capital Partners	Gold Sky Benefits	Buyout/LBO [†]		09-Dec-2021	Completed
Northleaf Capital Partners	Incentive Systems	Buyout/LBO [†]		05-Mar-2021	Completed
Northleaf Capital Partners	Plan Sponsor Consultants	Buyout/LBO [†]		02-Apr-2021	Completed
Northleaf Capital Partners	Bubrig Insurance Agency	Buyout/LBO [†]		04-Aug-2022	Completed
Northleaf Capital Partners	Calculated Risk Advisors	Buyout/LBO [†]		01-Nov-2021	Completed
Northleaf Capital Partners	Advisory Businesses Of Quintes	Buyout/LBO [†]		06-Oct-2022	Completed
Northleaf Capital Partners	E-Insure Services	Buyout/LBO [†]		07-Jun-2023	Completed
Northleaf Capital Partners	Hobson Insurance	Buyout/LBO [†]		05-Apr-2023	Completed
Northleaf Capital Partners	Golden Corner Wealth Advisors	Buyout/LBO [†]		07-Jul-2023	Completed
Northleaf Capital Partners	Shinstrom & Norman	Buyout/LBO [†]		10-Aug-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Northleaf Capital Partners	M.B.I. Group	Buyout/LBO [†]		04-Mar-2019	Completed
Northleaf Capital Partners	The Wooditch Company	Buyout/LBO [†]		02-May-2023	Completed
Northleaf Capital Partners	Golden Ears Insurance Services	Buyout/LBO [†]		02-Aug-2023	Completed
Northleaf Capital Partners	Rogersworks	Buyout/LBO [†]		18-Oct-2021	Completed
Northleaf Capital Partners	Defranco Insurance	Buyout/LBO [†]		06-Apr-2023	Completed
Northleaf Capital Partners	Insureon	Buyout/LBO [†]		01-Mar-2022	Completed
Northleaf Capital Partners	Johnston Lewis Associates	Buyout/LBO [†]		08-Jun-2023	Completed
Northleaf Capital Partners	Horizon Insurance	Buyout/LBO [†]		09-Aug-2023	Completed
Northleaf Capital Partners	CSi Advisory Services	Buyout/LBO [†]		06-Jun-2022	Completed
Northleaf Capital Partners	Stop Loss Insurance Brokers	Buyout/LBO [†]		27-Jul-2022	Completed
Northleaf Capital Partners	WhartonHill Advisors	Buyout/LBO [†]		15-Aug-2019	Completed
Northleaf Capital Partners	Risk Point Consulting	Buyout/LBO [†]		16-Jul-2021	Completed
Northleaf Capital Partners	Assured Risk Advisors	Buyout/LBO [†]		03-Aug-2023	Completed
Northleaf Capital Partners	Trusted Capital Group	Buyout/LBO [†]		01-Jul-2021	Completed
Northleaf Capital Partners	Great North Insurance Services	Buyout/LBO [†]		05-May-2022	Completed
Northleaf Capital Partners	KT&D	Buyout/LBO [†]		05-Aug-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Northleaf Capital Partners	Invensure Insurance Brokers	Buyout/LBO [†]		01-Dec-2022	Completed
Northleaf Capital Partners	Weiss-Schantz Agency	Buyout/LBO [†]		13-Apr-2023	Completed
Northleaf Capital Partners	Bridgecreek Investment Management	Buyout/LBO [†]		10-Nov-2022	Completed
Northleaf Capital Partners	MPE Employee Benefit Services	Buyout/LBO [†]		18-Jan-2021	Completed
Northleaf Capital Partners	Chatham Insurance Partners	Buyout/LBO [†]		14-Dec-2022	Completed
Northleaf Capital Partners	Baystate Fiduciary Advisors	Buyout/LBO [†]		11-Nov-2020	Completed
Northleaf Capital Partners	F.A.R.E. Healthcare	Buyout/LBO [†]		06-Sep-2023	Completed
Northleaf Capital Partners	Creative Benefits & Insurance Solutions	Buyout/LBO [†]		11-Jan-2023	Completed
Northleaf Capital Partners	Perennial Pension & Wealth	Buyout/LBO [†]		15-Aug-2019	Completed
Northleaf Capital Partners	Fiducia Group	Buyout/LBO [†]		01-Dec-2021	Completed
Northleaf Capital Partners	Brady Risk Management	Buyout/LBO [†]		01-Apr-2023	Completed
Northleaf Capital Partners	Edbrooke/Stelcner and Associates	Buyout/LBO [†]		17-Jul-2023	Completed
Northleaf Capital Partners	Miniter Group	Buyout/LBO [†]		17-Aug-2022	Completed
Northleaf Capital Partners	Heritage Wealth Management Group	Buyout/LBO [†]		20-Jun-2022	Completed
Northleaf Capital Partners	Dissinger Reed	Buyout/LBO [†]		16-Aug-2021	Completed
Northleaf Capital Partners	Taylor Advisors	Buyout/LBO [†]		02-Mar-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Northleaf Capital Partners	United Shortline Insurance Services	Buyout/LBO [†]		01-Nov-2020	Completed
Northleaf Capital Partners	Custom Results Corporate Consulting	Buyout/LBO [†]		08-Jun-2023	Completed
Northleaf Capital Partners	OSA Insurance Brokerage Services	Buyout/LBO [†]		05-Jan-2023	Completed
Northleaf Capital Partners	Chun-Ha Insurance Services	Buyout/LBO [†]		04-Apr-2022	Completed
Northleaf Capital Partners	Wealthplan Advisors	Buyout/LBO [†]		03-Aug-2022	Completed
Northleaf Capital Partners	Business Benefits Resource	Buyout/LBO [†]		08-Jun-2023	Completed
Northleaf Capital Partners	Peel & Holland	Buyout/LBO [†]		10-Apr-2022	Completed
Northleaf Capital Partners	Premiere Risk Management	Buyout/LBO [†]		03-Apr-2019	Completed
Northleaf Capital Partners	Grace & Porta Benefits	Buyout/LBO [†]		27-Jul-2022	Completed
Northleaf Capital Partners	AG Direct Hail Insurance	Buyout/LBO [†]		23-Feb-2023	Completed
Northleaf Capital Partners	The Spofford Group	Buyout/LBO [†]		17-Dec-2021	Completed
Northleaf Capital Partners	Epstein Financial	Buyout/LBO [†]		02-Jun-2021	Completed
Northleaf Capital Partners	Aegis Retirement Group	Buyout/LBO [†]		01-Jul-2021	Completed
Northleaf Capital Partners	Red Rock Financial	Buyout/LBO [†]		10-Apr-2023	Completed
Northleaf Capital Partners	JP Griffin Group	Buyout/LBO [†]		15-Dec-2021	Completed
Northleaf Capital Partners	Ibex Enterprises (Life and Health Assets)	Buyout/LBO [†]		01-Jun-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Northleaf Capital Partners	IBG Financial Partners	Buyout/LBO [†]		01-Apr-2021	Completed
Northleaf Capital Partners	Purselley Associates	Buyout/LBO [†]		20-Sep-2021	Completed
Northleaf Capital Partners	Compass Insurance Services	Buyout/LBO [†]		07-Jul-2022	Completed
Northleaf Capital Partners	Intercontinental Growth Strategies	Buyout/LBO [†]		08-Aug-2022	Completed
Northleaf Capital Partners	Coast to Coast Insurance Brokers	Buyout/LBO [†]		10-Jan-2023	Completed
Northleaf Capital Partners	Direct Advisors	Buyout/LBO [†]		07-Sep-2022	Completed
Northleaf Capital Partners	LSM Insurance	Buyout/LBO [†]		05-Mar-2020	Completed
Northleaf Capital Partners	Joseph Aiello & Associates	Buyout/LBO [†]		08-Jun-2023	Completed
Olam Capital	Curriculum Associates	PE Growth/Expansion		21-Jan-2022	Completed
Olam Capital	SoapBox Labs	Buyout/LBO [†]		22-Nov-2023	Completed
Olam Capital	Stile	Buyout/LBO [†]		17-Jul-2025	Completed
OMERS Private Equity	Auto Body Innovations	Buyout/LBO [†]		19-Oct-2023	Completed
OMERS Private Equity	Price's Collision Centers	Buyout/LBO [†]		09-Apr-2019	Completed
OnePrime Capital	Sprinklr	PE Growth/Expansion	\$650.00M	09-Sep-2020	Completed
Openlink Financial	SolArc	Buyout/LBO ^{†*}		30-Nov-2011	Completed
Openlink Financial	DBC Smart Software	Buyout/LBO [†]		19-Jan-2010	Completed
Openlink Financial	CubeLogic	Buyout/LBO [†]		21-Aug-2012	Completed
Otter Capital	Arch Capital Group	Buyout/LBO	\$763.20M	20-Nov-2001	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Palladium Equity Partners	Autohound Collision	Buyout/LBO [†]		25-Jul-2014	Completed
Palladium Equity Partners	HFH Collision	Buyout/LBO [†]		12-Apr-2013	Completed
Palladium Equity Partners	Collision Plus Auto Body Repair Centers	Buyout/LBO [†]		28-Dec-2012	Completed
Pamlico Capital	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed
Partners Group	Claritev	Buyout/LBO	\$7.50B	01-Jun-2016	Completed
Partners Group	Verisure	Buyout/LBO	\$2.38B	01-Sep-2011	Completed
Partners Group	Arlo (European Commercial Operations)	Buyout/LBO [†]	\$50.00M	02-Jan-2020	Completed
Partners Group	Patroll International	Buyout/LBO [†]	\$3.50M [£]	22-Apr-2014	Completed
Partners Group Private Equity	Arlo (European Commercial Operations)	Buyout/LBO [†]	\$50.00M	02-Jan-2020	Completed
Partners Group Private Equity	Falck Alarm	Buyout/LBO [†]		03-Oct-2016	Completed
Partners Group Private Equity	Sisqual WFM	Buyout/LBO [†]		04-Mar-2021	Completed
Partners Group Private Equity	Verisure	Buyout/LBO	\$2.38B	01-Sep-2011	Completed
Partners Group Private Equity	Patroll International	Buyout/LBO [†]	\$3.50M [£]	22-Apr-2014	Completed
PCG Capital Partners	GE Healthcare Information Technology (patient statement business)	Buyout/LBO [†]		29-Sep-2008	Completed
Permira	Tymeshift	Buyout/LBO [†]		22-Jun-2023	Completed
Permira	Interactive Intelligence Group	Buyout/LBO [†]	\$1.40B	01-Dec-2016	Completed
Permira	Stile	Buyout/LBO [†]		17-Jul-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Permira	Exceed.AI	Buyout/LBO [†]	\$35.00M	01-Dec-2021	Completed
Permira	Pointillist	Buyout/LBO [†]	\$150.00M	01-Dec-2021	Completed
Permira	Radarr	Buyout/LBO [†]		02-Feb-2024	Completed
Permira	Ultimate (Automation/Workflow Software)	Buyout/LBO [†]		13-Mar-2024	Completed
Permira	nGUVU	Buyout/LBO [†]		03-Mar-2020	Completed
Permira	Zendesk	Buyout/LBO	\$10.20B	22-Nov-2022	Completed
Permira	HyperArc	Buyout/LBO [†]		14-Jun-2025	Completed
Permira	Local Measure International	Buyout/LBO [†]		20-May-2025	Completed
Permira	LivaNova	Buyout/LBO		04-Mar-2021	Failed/Cancelled
Permira	Klaus	Buyout/LBO [†]		12-Feb-2024	Completed
Permira	Silver Lining Solutions	Buyout/LBO [†]		27-Feb-2017	Completed
Permira	Genesys	Secondary Transaction - Private	\$900.00M	21-Jul-2016	Completed
Permira	SoapBox Labs	Buyout/LBO [†]		22-Nov-2023	Completed
Pharmaceutical Product Development	Evidera	Buyout/LBO [†]		16-Aug-2016	Completed
Pharmaceutical Product Development	Clinical Research Advantage Holdings	Buyout/LBO [†]		24-Feb-2015	Completed
Pharmaceutical Product Development	Accelerated Enrollment Solutions	Buyout/LBO [†]		07-Aug-2013	Completed
Pohlad Companies	American HealthTech	Buyout/LBO [†]		16-Jan-2024	Completed
Pohlad Companies	Accu Med Technology Solutions	Buyout/LBO [†]		08-Oct-2012	Completed
Pohlad Companies	Patient Pattern	Buyout/LBO [†]		13-Mar-2023	Completed
Pohlad Companies	Audacious Inquiry	Buyout/LBO [†]	\$316.70M	16-Mar-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
PointClickCare	Accu Med Technology Solutions	Buyout/LBO [†]		08-Oct-2012	Completed
PointClickCare	American HealthTech	Buyout/LBO [†]		16-Jan-2024	Completed
PointClickCare	Patient Pattern	Buyout/LBO [†]		13-Mar-2023	Completed
PointClickCare	Audacious Inquiry	Buyout/LBO [†]	\$316.70M	16-Mar-2022	Completed
Polaris Partners	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
Praesidian Capital	Raintree Insurance Agency	Buyout/LBO [†]		06-Nov-2012	Completed
Providence Equity Partners	ProSiebenSat.1 Media	Buyout/LBO	\$525.00M	11-Aug-2003	Completed
Providence Equity Partners	Embanet	Later Stage VC		02-Aug-2007	Completed
Providence Equity Partners	T-Mobile US	Spin-Off		01-Apr-1999	Completed
Provider Investment	Tangozebra	Buyout/LBO [†]	\$15.00M	01-Mar-2007	Completed
Quadrangle Group	ProSiebenSat.1 Media	Buyout/LBO	\$525.00M	11-Aug-2003	Completed
Redpoint Ventures	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
Renaissance Learning	UClass	Buyout/LBO [†]		19-Feb-2015	Completed
Renaissance Learning	myON	Buyout/LBO [†]		19-Mar-2018	Completed
Rethink Capital Partners	Ignite Reading	Early Stage VC*	\$10.00M	17-Jan-2023	Completed
Revery Group	Well (Other Healthcare Technology Systems)	Early Stage VC	\$71.90M	17-Dec-2021	Completed
Revolution (Washington DC)	Sprinklr	PE Growth/Expansion	\$650.00M	09-Sep-2020	Completed
Ridgemont Equity Partners	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed
Rustic Canyon Partners	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
Saban Capital Group	ProSiebenSat.1 Media	Buyout/LBO	\$525.00M	11-Aug-2003	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Sageview Capital	Gartmore Group	Buyout/LBO	\$500.00M	26-May-2006	Completed
Saints Capital	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
Salesforce Ventures	Radarr	Buyout/LBO [†]		02-Feb-2024	Completed
Sampo	Polskie ePłatności	Buyout/LBO [†]	\$500.00M	14-Oct-2020	Completed
Sampo	Poplatek Payments	Buyout/LBO [†]		23-Dec-2019	Completed
Sampo	Nets	Buyout/LBO	\$33.07B	13-Feb-2018	Completed
Scout24	Immobilien	Buyout/LBO ^{†**}		28-May-2014	Completed
Scout24	Classmarkets	Buyout/LBO [†]	\$4.17M	08-Sep-2015	Completed
Sculptor	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed
Sedgwick Claims Management Services	Galaher Settlements	Buyout/LBO ^{†**}	\$22.70M	31-May-2011	Completed
Sedgwick Claims Management Services	Specialty Risk Services	Buyout/LBO ^{†**}	\$278.00M	31-Mar-2011	Completed
Sedgwick Claims Management Services	Factual Photo	Buyout/LBO [†]		01-Nov-2010	Completed
Sedgwick Claims Management Services	Selective Settlements International	Buyout/LBO ^{†**}		12-May-2011	Completed
Sedgwick Claims Management Services	Nationwide (Productivity Solutions Business)	Buyout/LBO ^{†**}		30-Jun-2011	Completed
ServiceNow Ventures	Radarr	Buyout/LBO [†]		02-Feb-2024	Completed
Sheridan Healthcare	Liberty Anesthesia	Buyout/LBO [†]		01-Sep-2013	Completed
Sierra Ventures	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed
Silver Lake	ClicData	Buyout/LBO [†]		03-Jul-2025	Completed
Silver Lake	Muscope	Buyout/LBO [†]		18-Nov-2024	Completed
Silver Lake	xstream	Buyout/LBO [†]		18-Sep-2025	Completed
Silver Lake	Clémentine	Buyout/LBO [†]		01-Jul-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Silver Lake	Distrito K	Buyout/LBO [†]		17-Sep-2024	Completed
Silver Lake	Greenext Technologies	Buyout/LBO [†]		01-May-2023	Completed
Silver Lake	Change Capital	Buyout/LBO [†]		25-Jun-2024	Completed
Silver Lake	Golden Soft	Buyout/LBO [†]		27-Feb-2025	Completed
Silver Lake	Morning (Tel Aviv)	Buyout/LBO [†]	\$150.00M	22-Dec-2024	Completed
Silver Lake	Poker (Italy)	Buyout/LBO [†]		01-Mar-2024	Completed
Silver Lake	Millesimo	Buyout/LBO [†]		31-Mar-2025	Completed
Silver Lake	Sellsy	Buyout/LBO [†]		24-Sep-2025	Announced/In Progress
Silver Lake	Aplifisa	Buyout/LBO [†]		23-May-2023	Completed
s-in soluzioni informatiche	Aldebra (Marketing Software Solutions and Consultancy Services)	Buyout/LBO [†]		11-Feb-2020	Completed
Sixth Street Partners	Sprinklr	PE Growth/Expansion	\$650.00M	09-Sep-2020	Completed
Snap One	Allnet Distributing	Buyout/LBO [†]		22-Mar-2018	Completed
Snap One	Access Networks	Buyout/LBO [†]		06-May-2021	Completed
Snap One	MRI Premium Distribution Services	Buyout/LBO [†]		15-Mar-2019	Completed
Snap One	Custom Plus Distributing	Buyout/LBO [†]		19-Jul-2019	Completed
Snap One	HCA Distributing	Buyout/LBO [†]		01-Apr-2021	Completed
Snap One	Control4	Buyout/LBO [†]	\$680.00M	01-Aug-2019	Completed
Snap One	Volutone Distributing Co.	Buyout/LBO [†]		13-Nov-2018	Completed
Specialty Program Group	Norman-Spencer Agency (Marine and Crane Business)	Merger/Acquisition*		12-Apr-2018	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Spirit Realty Capital	Ochre Media	Buyout/LBO [†]		08-Jul-2016	Completed
Spirit Realty Capital	Murdock Chevrolet	Buyout/LBO [†]		15-Dec-2014	Completed
StepStone Group	Concardis	Buyout/LBO [†]		07-Jan-2019	Completed
StepStone Group	Polskie ePłatności	Buyout/LBO [†]	\$500.00M	14-Oct-2020	Completed
StepStone Group	Poplatek (Espoo)	Buyout/LBO [†]		23-Dec-2019	Completed
StepStone Group	eCard	Buyout/LBO [†]	\$73.00M	04-Jan-2019	Completed
StepStone Group	Poplatek Payments	Buyout/LBO [†]		23-Dec-2019	Completed
StepStone Group	CCV Schweiz	Buyout/LBO [†]		21-Oct-2020	Completed
StepStone Group	Przelewy24	Buyout/LBO [†]		02-Aug-2019	Completed
StepStone Group	Nets	Buyout/LBO	\$33.07B	13-Feb-2018	Completed
Still Capital Partners	Well (Other Healthcare Technology Systems)	Early Stage VC	\$71.90M	17-Dec-2021	Completed
Stockwell Capital	Affinnova	Buyout/LBO [†]		29-Oct-2014	Completed
Stockwell Capital	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed
Stockwell Capital	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed
Stockwell Capital	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
Stockwell Capital	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
Stockwell Capital	vBrand	Buyout/LBO [†]		03-Aug-2017	Completed
Stone Point Capital	Policy Works	Buyout/LBO [†]		15-Oct-2019	Completed
Stone Point Capital	TechCanary	Buyout/LBO [†]		10-Apr-2019	Completed
Stone Point Capital	Tarmika	Buyout/LBO [†]		12-Aug-2022	Completed
Stone Point Capital	Specialty Risk Services	Buyout/LBO [†]	\$278.00M	31-Mar-2011	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Stone Point Capital	Nationwide (Productivity Solutions Business)	Buyout/LBO [†]		30-Jun-2011	Completed
Stone Point Capital	Selective Settlements International	Buyout/LBO [†]		12-May-2011	Completed
Stone Point Capital	Risk Handler Software	Buyout/LBO [†]		06-Dec-2022	Completed
Stone Point Capital	PARIS RE Holdings	Buyout/LBO [*]	\$158.00M	02-Jan-2007	Completed
Stone Point Capital	Galaher Settlements	Buyout/LBO [†]	\$22.70M	31-May-2011	Completed
Stone Point Capital	Indio Technologies	Buyout/LBO [†]		05-Dec-2019	Completed
Stone Point Capital	Factual Photo	Buyout/LBO [†]		01-Nov-2010	Completed
Stone Point Capital	Cytora	Buyout/LBO [†]		09-Sep-2025	Completed
Stone Point Capital	Sedgwick Claims Management Services	Buyout/LBO	\$1.10B	29-May-2010	Completed
Stone Point Capital	EZLynx	Buyout/LBO [†]		09-Mar-2021	Completed
Stone Point Capital	Planck	Buyout/LBO [†]		23-Jul-2024	Completed
TA Associates Management	PowerBar	PE Growth/Expansion		01-Jan-1996	Completed
Tactico	Embanet	Later Stage VC		02-Aug-2007	Completed
Tao Capital Partners	Patient Pattern	Buyout/LBO [†]		13-Mar-2023	Completed
Tao Capital Partners	American HealthTech	Buyout/LBO [†]		16-Jan-2024	Completed
Tao Capital Partners	Audacious Inquiry	Buyout/LBO [†]	\$316.70M	16-Mar-2022	Completed
T.Capital	Scout24	Buyout/LBO	\$2.00B	01-Feb-2014	Completed
TCV	Bold360	Buyout/LBO [†]		05-May-2021	Completed
TCV	nGUVU	Buyout/LBO [†]		03-Mar-2020	Completed
TCV	Pointillist	Buyout/LBO [†]	\$150.00M	01-Dec-2021	Completed
TCV	Embanet	Later Stage VC		02-Aug-2007	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
TCV	Silver Lining Solutions	Buyout/LBO [†]		27-Feb-2017	Completed
TCV	Interactive Intelligence Group	Buyout/LBO [†]	\$1.40B	01-Dec-2016	Completed
TCV	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed
TeamSystem	Cassanova	Buyout/LBO [†]		01-Jul-2017	Completed
TeamSystem	Readytec	Buyout/LBO [†]		06-Apr-2023	Completed
TeamSystem	Software Time	Buyout/LBO [†]		31-May-2017	Completed
TeamSystem	Microntel	Buyout/LBO [†]		20-Mar-2023	Completed
TeamSystem	MBM Italia	Buyout/LBO [†]		08-Apr-2020	Completed
TeamSystem	Aplifisa	Buyout/LBO [†]		23-May-2023	Completed
TeamSystem	Informatica Veneta	Buyout/LBO [†]		01-Sep-2016	Completed
TeamSystem	Sellsy	Buyout/LBO [†]		24-Sep-2025	Announced/In Progress
TeamSystem	Globase International	Buyout/LBO [†]		12-Jul-2023	Completed
TeamSystem	ITReview	Buyout/LBO [†]		18-Oct-2022	Completed
TeamSystem	Logical Soft	Buyout/LBO [†]		04-Nov-2021	Completed
TeamSystem	Alkè (Information Technology Division)	Buyout/LBO [†]		01-Sep-2016	Completed
TeamSystem	Storeden	Buyout/LBO [†]		14-Feb-2022	Completed
TeamSystem	TS C&D	Buyout/LBO [†]		01-Dec-2016	Completed
TeamSystem	Billin	Buyout/LBO [†]		17-Feb-2021	Completed
TeamSystem	Muscope	Buyout/LBO [†]		18-Nov-2024	Completed
TeamSystem	Mikro Yazilim	Buyout/LBO [†]		28-Jul-2023	Completed
TeamSystem	Sogesi	Buyout/LBO [†]		23-Feb-2021	Completed
TeamSystem	ContactLab	Buyout/LBO [†]		13-Jul-2023	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
TeamSystem	e-conomic	Buyout/LBO [†]		17-Jun-2016	Completed
TeamSystem	Multidata	Buyout/LBO [†]		13-Mar-2023	Completed
TeamSystem	Area32	Buyout/LBO [†]		01-Feb-2020	Completed
TeamSystem	AliasLab	Buyout/LBO [†]		01-Dec-2016	Completed
TeamSystem	Sedas	Buyout/LBO [†]		20-Jan-2022	Completed
TeamSystem	Beneficy	Buyout/LBO [†]		29-May-2020	Completed
TeamSystem	Mondoesa Laghi	Buyout/LBO [†]	\$0.10M	31-Dec-2015	Completed
TeamSystem	Caliò Informatica	Buyout/LBO [†]		23-Feb-2021	Completed
TeamSystem	xstream	Buyout/LBO [†]		18-Sep-2025	Completed
TeamSystem	Clémentine	Buyout/LBO [†]		01-Jul-2024	Completed
TeamSystem	SkyLab Italia	Buyout/LBO [†]		18-Jun-2019	Completed
TeamSystem	MadBit Entertainment	Buyout/LBO [†]		15-Sep-2015	Completed
TeamSystem	Software Del Sol	Buyout/LBO [†]		17-Feb-2021	Completed
TeamSystem	modeFinance	Buyout/LBO [†]		03-Mar-2021	Completed
TeamSystem	EvolutionFit	Buyout/LBO [†]		01-Jun-2017	Completed
TeamSystem	TechMass	Buyout/LBO [†]		01-Sep-2019	Completed
TeamSystem	Greenext Technologies	Buyout/LBO [†]		01-May-2023	Completed
TeamSystem	Golden Soft	Buyout/LBO [†]		27-Feb-2025	Completed
TeamSystem	Mondora	Buyout/LBO [†]	\$0.90M	01-Jun-2016	Completed
TeamSystem	Ulisse Technologie	Buyout/LBO [†]	\$1.90M	31-Dec-2015	Completed
TeamSystem	Poker (Italy)	Buyout/LBO [†]		01-Mar-2024	Completed
TeamSystem	Acumbamail	Buyout/LBO [†]		13-Jul-2023	Completed
TeamSystem	Morning (Tel Aviv)	Buyout/LBO [†]	\$150.00M	22-Dec-2024	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
TeamSystem	Multimedia IT	Buyout/LBO [†]		01-Jun-2017	Completed
TeamSystem	NetLex (Rome)	Buyout/LBO [†]		01-Apr-2017	Completed
TeamSystem	Aldebra (Marketing Software Solutions and Consultancy Services)	Buyout/LBO [†]		11-Feb-2020	Completed
TeamSystem	Millesimo	Buyout/LBO [†]		31-Mar-2025	Completed
TeamSystem	Itacme Informatica	Buyout/LBO [†]		01-Oct-2021	Completed
TeamSystem	Change Capital	Buyout/LBO [†]		25-Jun-2024	Completed
TeamSystem	ClicData	Buyout/LBO [†]		03-Jul-2025	Completed
TeamSystem	Distrito K	Buyout/LBO [†]		17-Sep-2024	Completed
TeleSoft Partners	Nexant	Later Stage VC		01-Jan-2007	Completed
Temasek Holdings	Henriott Group	Buyout/LBO [†]		01-Apr-2025	Completed
Temasek Holdings	Scott Held Insurance Agency	Buyout/LBO [†]		04-Jun-2025	Completed
Temasek Holdings	Wycoff Insurance Agency	Buyout/LBO [†]		05-Jun-2025	Completed
Temasek Holdings	Fifth Avenue Agency	Buyout/LBO [†]		16-May-2025	Completed
The Carlyle Group	Daikin Comfort Technologies North America	Buyout/LBO	\$1.81B	13-Feb-2008	Completed
The Carlyle Group	Medline Industries	Buyout/LBO	\$34.00B	05-Jun-2021	Completed
The Carlyle Group	Vantage Risk	PE Growth/Expansion	\$200.00M	08-Feb-2022	Completed
The Carlyle Group	Accelerated Enrollment Solutions	Buyout/LBO [†]		07-Aug-2013	Completed
The Carlyle Group	LPL Independent Advisor Services Group	Buyout/LBO [†]	\$120.48M	20-Jun-2007	Completed
The Carlyle Group	GlanceGuide	Buyout/LBO [†]		04-May-2010	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
The Carlyle Group	Independent Financial Marketing Group	Buyout/LBO [†]	\$25.69M	05-Sep-2007	Completed
The Carlyle Group	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed
The Carlyle Group	X-Chem	Buyout/LBO		01-Jan-2015	Completed
The Carlyle Group	Stat Health Care	Buyout/LBO [†]		11-Jan-2023	Completed
The Carlyle Group	National Retirement Partners	Buyout/LBO [†]	\$25.30M	09-Feb-2011	Completed
The Carlyle Group	Vantage Risk	PE Growth/Expansion	\$1.00B	03-Dec-2020	Completed
The Carlyle Group	PrefConnect	Buyout/LBO [†]		21-Sep-2023	Completed
The Carlyle Group	Media Instruments	Buyout/LBO [†]		26-Mar-2010	Completed
The Carlyle Group	Pharmaceutical Product Development	Buyout/LBO	\$3.90B	05-Dec-2011	Completed
The Carlyle Group	United Medco	Buyout/LBO [†]		10-Jan-2024	Completed
The Carlyle Group	LPL Financial Holdings	Buyout/LBO	\$1.50B	28-Dec-2005	Completed
The Carlyle Group	Vantage Risk Assurance Company	Buyout/LBO [†]		08-Feb-2022	Completed
The Carlyle Group	AG Cuffill	Buyout/LBO [†]		07-Mar-2024	Completed
The Carlyle Group	Clinical Research Advantage Holdings	Buyout/LBO [†]		24-Feb-2015	Completed
The Carlyle Group	Nielsen IAG	Buyout/LBO [†]	\$223.00M	16-May-2008	Completed
The Carlyle Group	Affinova	Buyout/LBO [†]		29-Oct-2014	Completed
The Carlyle Group	Pharmaceutical Product Development	PE Growth/Expansion		08-May-2017	Completed
The Carlyle Group	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
The Carlyle Group	vBrand	Buyout/LBO [†]		03-Aug-2017	Completed
The Carlyle Group	Medisiss	Buyout/LBO [†]		01-Jan-2012	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
The Carlyle Group	Telephia	Buyout/LBO [†]	\$440.00M	10-Aug-2007	Completed
The Carlyle Group	Radio & Records	Buyout/LBO [†]		01-Aug-2006	Completed
The Carlyle Group	Ecolab (Global Surgical Solutions)	Buyout/LBO [†]	\$950.00M	01-Aug-2024	Completed
The Carlyle Group	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed
The Carlyle Group	USP Market Intelligence	Buyout/LBO [†]		08-Feb-2010	Completed
The Carlyle Group	KoreanClick	Buyout/LBO [†]		09-Sep-2009	Completed
The Carlyle Group	Evidera	Buyout/LBO [†]		16-Aug-2016	Completed
The Goldman Sachs Group	Upromise	Early Stage VC	\$55.00M	06-Nov-2000	Completed
The Goldman Sachs Group	LPL Independent Advisor Services Group	Buyout/LBO [†]	\$120.48M	20-Jun-2007	Completed
The Goldman Sachs Group	T-Mobile US	Spin-Off		01-Apr-1999	Completed
The Goldman Sachs Group	LPL Financial Holdings	Buyout/LBO	\$1.50B	28-Dec-2005	Completed
The Nielsen Company	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
The Nielsen Company	Media Instruments	Buyout/LBO ^{†*}		26-Mar-2010	Completed
The Nielsen Company	Nielsen IAG	Buyout/LBO [†]	\$223.00M	16-May-2008	Completed
The Nielsen Company	KoreanClick	Buyout/LBO ^{†*}		09-Sep-2009	Completed
The Nielsen Company	vBrand	Buyout/LBO ^{†*}		03-Aug-2017	Completed
The Nielsen Company	Telephia	Buyout/LBO [†]	\$440.00M	10-Aug-2007	Completed
The Nielsen Company	Radio & Records	Buyout/LBO [†]		01-Aug-2006	Completed
The Nielsen Company	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed
The Nielsen Company	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
The Nielsen Company	GlanceGuide	Buyout/LBO ^{†*}		04-May-2010	Completed
The Nielsen Company	USP Market Intelligence	Buyout/LBO ^{†*}		08-Feb-2010	Completed
The Nielsen Company	Affinova	Buyout/LBO [†]		29-Oct-2014	Completed
The Nielsen Company	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
The Westly Group	Surge Medicine	Early Stage VC	\$8.50M	10-Jun-2007	Completed
Thoma Bravo	Eclipse (IT Consulting and Outsourcing)	Buyout/LBO [†]	\$100.50M	17-Aug-2007	Completed
Thoma Bravo	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed
Thoma Bravo	Activant Silk Systems	Buyout/LBO [†]	\$6.90M	31-May-2007	Completed
Thoma Bravo	Nasdaq	PE Growth/Expansion	\$5.13M	12-Nov-2001	Completed
Thoma Bravo	Activant Solutions	Buyout/LBO	\$785.00M	03-May-2006	Completed
Thomas H. Lee Partners	GlanceGuide	Buyout/LBO [†]		04-May-2010	Completed
Thomas H. Lee Partners	vBrand	Buyout/LBO [†]		03-Aug-2017	Completed
Thomas H. Lee Partners	USP Market Intelligence	Buyout/LBO [†]		08-Feb-2010	Completed
Thomas H. Lee Partners	Radio & Records	Buyout/LBO [†]		01-Aug-2006	Completed
Thomas H. Lee Partners	Affinova	Buyout/LBO [†]		29-Oct-2014	Completed
Thomas H. Lee Partners	@Futures	Buyout/LBO [†]		01-Jan-2010	Completed
Thomas H. Lee Partners	Media Instruments	Buyout/LBO [†]		26-Mar-2010	Completed
Thomas H. Lee Partners	KoreanClick	Buyout/LBO [†]		09-Sep-2009	Completed
Thomas H. Lee Partners	GfK (Swiss Consumer Goods Unit)	Buyout/LBO [†]		26-Jun-2009	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Thomas H. Lee Partners	Telephia	Buyout/LBO [†]	\$440.00M	10-Aug-2007	Completed
Thomas H. Lee Partners	Nielsen IAG	Buyout/LBO [†]	\$223.00M	16-May-2008	Completed
Thomas H. Lee Partners	The Cambridge Group	Buyout/LBO [†]	\$61.20M	18-Mar-2009	Completed
Thomas H. Lee Partners	ProSiebenSat.1 Media	Buyout/LBO	\$525.00M	11-Aug-2003	Completed
Thomas H. Lee Partners	Claritas	Buyout/LBO [†]		01-Jan-2009	Completed
Tiburon Strategic Advisors	PRW Wealth Management	Buyout/LBO [†]		16-Nov-2023	Completed
Tiburon Strategic Advisors	Align Wealth Management	Buyout/LBO [†]		03-Oct-2023	Completed
Tiburon Strategic Advisors	New England Pension Plan Systems	Buyout/LBO [†]		14-Dec-2023	Completed
Tiburon Strategic Advisors	Cahill Wealth Management	Buyout/LBO [†]		05-May-2025	Completed
Tiburon Strategic Advisors	Soundmark Wealth Management	Buyout/LBO [†]		13-May-2024	Completed
Tiburon Strategic Advisors	Herrmann & Cooke Wealth Management	Buyout/LBO [†]		05-Oct-2022	Completed
TotalEnergies	Gaztransport & Technigaz	Secondary Transaction - Private	\$310.00M	06-Mar-2008	Completed
TPG	Technische Comp Systeme Süssen (Elec Eng Software Business)	Buyout/LBO [†]		05-Nov-2009	Completed
TPG	National Retirement Partners	Buyout/LBO [†]	\$25.30M	09-Feb-2011	Completed
TPG	Helix Education	Buyout/LBO [†]		13-Apr-2015	Completed
TPG	GISquadrat (Software Operations)	Buyout/LBO [†]		10-Apr-2007	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
TPG	COADE	Buyout/LBO [†]		06-Jan-2010	Completed
TPG	UVEST Financial Services	Buyout/LBO [†]	\$89.45M	02-Jan-2007	Completed
TPG	LPL Independent Advisor Services Group	Buyout/LBO [†]	\$120.48M	20-Jun-2007	Completed
TPG	LPL Financial Holdings	Buyout/LBO	\$1.50B	28-Dec-2005	Completed
TPG	Checkmarx	Buyout/LBO	\$1.15B	16-Mar-2020	Completed
TPG	Intergraph	Buyout/LBO	\$1.30B [£]	29-Nov-2006	Completed
TPG	TechServer	Buyout/LBO [†]		06-May-2008	Completed
TPG	Independent Financial Marketing Group	Buyout/LBO [†]	\$25.69M	05-Sep-2007	Completed
TPG	Aplifi	PE Growth/Expansion		11-Jun-2007	Completed
TPG	Dustico	Buyout/LBO [†]		05-Aug-2021	Completed
TPG	Ellucian	Buyout/LBO	\$570.00M	10-Dec-2009	Completed
TPG	Texas Genco	Buyout/LBO [*]	\$3.65B	13-Apr-2005	Completed
T. Rowe Price Group	Henriott Group	Buyout/LBO [†]		01-Apr-2025	Completed
T. Rowe Price Group	Wycoff Insurance Agency	Buyout/LBO [†]		05-Jun-2025	Completed
T. Rowe Price Group	Fifth Avenue Agency	Buyout/LBO [†]		16-May-2025	Completed
T. Rowe Price Group	Scott Held Insurance Agency	Buyout/LBO [†]		04-Jun-2025	Completed
Tysers	Sharebridge Private Equity Consolidated	PE Growth/Expansion		17-Dec-2008	Completed
UKG	EverythingBenefits	Buyout/LBO [†]		01-Jun-2021	Completed
UKG	Optimum Solutions (Nashville)	Buyout/LBO [†]		02-Oct-2019	Completed
UKG	Interboro Systems Corporation	Buyout/LBO [†]		01-Jan-2022	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
UKG	Shiftboard	Buyout/LBO [†]		30-May-2025	Completed
UKG	Deploy Solutions	Buyout/LBO [†]		31-Oct-2007	Completed
UKG	SpotCues	Buyout/LBO [†]		01-Jan-2022	Completed
UKG	Captor Group	Buyout/LBO [†]		13-Jun-2007	Completed
UKG	Smart Computer Holdings	Buyout/LBO ^{†*}		17-Apr-2012	Completed
UKG	Great Place to Work Institute	Buyout/LBO [†]		01-Sep-2021	Completed
UKG	Principal Decision Systems International	Buyout/LBO ^{†*}		02-May-2011	Completed
UKG	OptiLink	Buyout/LBO [†]		20-Jan-2012	Completed
UKG	Kronos SaaShr	Buyout/LBO [†]		28-Mar-2012	Completed
UKG	WebApps	Buyout/LBO ^{†*}		28-Mar-2012	Completed
UKG	Financial Management Solutions	Buyout/LBO [†]		05-Jan-2017	Completed
UKG	Empower Software Solutions	Buyout/LBO ^{†*}		14-Jan-2016	Completed
UKG	Kaba Workforce Solutions (AutoTime Business)	Buyout/LBO ^{†*}		18-Sep-2015	Completed
UKG	Datamatics Management Services	Buyout/LBO ^{†*}		25-Oct-2016	Completed
UKG	Time Link International	Buyout/LBO [†]		20-Aug-2013	Completed
UKG	Ascentis	Buyout/LBO [†]		09-Mar-2022	Completed
UKG	Quorbit	Buyout/LBO [†]		03-Nov-2022	Completed
UKG	Immedis	Buyout/LBO [†]	\$550.00M	01-Jul-2023	Completed
UKG	Stromberg	Buyout/LBO ^{†*}	\$13.60M	14-Oct-2009	Completed
Valeas Capital Partners	The Quarters Columbia	Buyout/LBO [†]		22-Jan-2025	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Valeas Capital Partners	Moss Adams	Buyout/LBO [†]	\$7.00B	03-Jun-2025	Completed
Valeas Capital Partners	Sockeye Business Solutions	Buyout/LBO [†]		18-Jun-2025	Announced/In Progress
Valeas Capital Partners	Hayflich CPAs	Buyout/LBO [†]		27-Feb-2025	Completed
Valeas Capital Partners	Invoke Tax Partners	Buyout/LBO [†]		27-Mar-2025	Completed
Valeas Capital Partners	Baker Tilly (Chicago)	Buyout/LBO	\$1.00B	07-Feb-2024	Completed
Valeas Capital Partners	CironeFriedberg	Buyout/LBO [†]		11-Feb-2025	Completed
Valeas Capital Partners	Hancock Askew & Co.	Buyout/LBO [†]		03-Feb-2025	Completed
Valeas Capital Partners	Seiler	Buyout/LBO [†]		01-Jul-2024	Completed
Valeas Capital Partners	KraftCPAs	Buyout/LBO [†]		26-Jun-2025	Announced/In Progress
Valeas Capital Partners	Well (Other Healthcare Technology Systems)	Early Stage VC*	\$71.90M	17-Dec-2021	Completed
Valion Eläkekassa	Regina Maria	Buyout/LBO [†]	\$1.10B	01-Apr-2025	Completed
Valion Eläkekassa	9Lives Kotipalvelut	Buyout/LBO [†]		29-May-2025	Completed
Valion Eläkekassa	MediGroup	Buyout/LBO [†]		01-Apr-2025	Announced/In Progress
ValueAct Capital Management	Intergraph	Buyout/LBO	\$1.30B ^E	29-Nov-2006	Completed
Vantage Risk	Vantage Risk Assurance Company	Buyout/LBO [†]		08-Feb-2022	Completed
Verisure	Sisqual WFM	Buyout/LBO [†]		04-Mar-2021	Completed
Verisure	Falck Alarm	Buyout/LBO [†]		03-Oct-2016	Completed
Verisure	Arlo (European Commercial Operations)	Buyout/LBO [†]	\$50.00M	02-Jan-2020	Completed
Verisure	Patroll International	Buyout/LBO [†]	\$3.50M ^E	22-Apr-2014	Completed
Verisure	ADT México	Buyout/LBO [†]		16-Jun-2025	Announced/In Progress

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Verisure	Segur Control	Buyout/LBO [†]	\$20.30M	27-Oct-2015	Completed
Vertafore	FinancePro	Buyout/LBO [†]		16-Mar-2006	Completed
Vertafore	Sircon	Buyout/LBO [†]		01-Jul-2008	Completed
Vertafore	Custom Insurance Solutions	Buyout/LBO [†]		03-Feb-2005	Completed
Vertafore	ImageRight	Buyout/LBO [†]		12-Apr-2007	Completed
Vertafore	BCF Technology (Software Solutions)	Buyout/LBO [†]		12-Jul-2006	Completed
Vertafore	InStar	Buyout/LBO [†]		21-Jun-2005	Completed
Vestar Capital Partners	PARIS RE Holdings	Buyout/LBO	\$158.00M	02-Jan-2007	Completed
Vestar Capital Partners	The Nielsen Company (Marketing Mix Modeling Business Division)	Buyout/LBO [†]		31-Dec-2024	Completed
Vestar Capital Partners	Golf Datatech	Buyout/LBO [†]		31-Jan-2024	Completed
Wand Partners	Ensera	Buyout/LBO [†]	\$14.00M	24-Sep-2001	Completed
Warburg Pincus	New England Pension Plan Systems	Buyout/LBO [†]		14-Dec-2023	Completed
Warburg Pincus	Finamatrix	Buyout/LBO [†]		17-Jan-2018	Completed
Warburg Pincus	Align Wealth Management	Buyout/LBO [†]		03-Oct-2023	Completed
Warburg Pincus	Soundmark Wealth Management	Buyout/LBO [†]		13-May-2024	Completed
Warburg Pincus	Mattel	PIPE		01-Jan-1984	Completed
Warburg Pincus	Arch Capital Group	Buyout/LBO	\$763.20M	20-Nov-2001	Completed
Warburg Pincus	Cahill Wealth Management	Buyout/LBO [†]		05-May-2025	Completed
Warburg Pincus	Edelman Financial Engines	PE Growth/Expansion		14-Apr-2021	Completed

Investor	Deal Name	Deal Types	Deal Size	Deal Date	Deal Status
Warburg Pincus	PRW Wealth Management	Buyout/LBO [†]		16-Nov-2023	Completed
Warburg Pincus	Herrmann & Cooke Wealth Management	Buyout/LBO [†]		05-Oct-2022	Completed
W Capital Partners	UnityWorks	Buyout/LBO [†]		27-Jul-2015	Completed
W Capital Partners	Shiftboard	Buyout/LBO [†]		30-May-2025	Completed
Weiss Peck & Greer	Tangozebra	Buyout/LBO [†]	\$15.00M	01-Mar-2007	Completed
Western Technology Investment	DG FastChannel	Later Stage VC	\$0.54M	01-Jan-1996	Completed
Wing Venture Capital	Ignite Reading	Early Stage VC	\$10.00M	17-Jan-2023	Completed
Zendesk	Local Measure International	Buyout/LBO [†]		20-May-2025	Completed
Zendesk	HyperArc	Buyout/LBO [†]		14-Jun-2025	Completed
Zendesk	Ultimate (Automation/Workflow Software)	Buyout/LBO [†]		13-Mar-2024	Completed
Zendesk	Klaus	Buyout/LBO [†]		12-Feb-2024	Completed
Zendesk	Tymeshift	Buyout/LBO [†]		22-Jun-2023	Completed
Zeus Health	MedAlliance (Drug Delivery)	Buyout/LBO [†]	\$1.14B	01-Jan-2023	Completed
Zeus Health	Cordis	Buyout/LBO	\$1.00B	02-Aug-2021	Completed
Zoom Communications	Ignite Reading	Early Stage VC	\$10.00M	17-Jan-2023	Completed

[†] Indicates Add-On Deal
^{*} Lead/Sole
^E Estimated

Funds

Fund Families (12)

Open Fund Family Benchmark

HF Venture Fund (1 fund) Venture - General | San Francisco, CA

Venture Capital

No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	Fund Performance Score
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HF Venture Fund I Closed 2024 \$5.00M

Hellman & Friedman Capital Partners (11 funds) Buyout | San Francisco, CA

Private Equity

Performance Score

62.4

Capital Call Speed Score

43.7

Distribution Speed Score

55.2

★ indicates a high degree and persistence of the outperformance of a fund family. Only the Fund Families with a performance score of '70' or above are awarded.

Speed Scores are a measurement of the relative quickness of a fund family's cash flows, representing how much faster (high scores), or slower (low scores) capital was distributed or contributed compared to its benchmark.

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	Fund Performance Score
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Hellman & Friedman Capital Partners XI	2025 Q2	Closed	2023	\$22.30B				0.00x		
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Hellman & Friedman Capital Partners X	2025 Q2	Closed	2021	\$24.40B	+6.19%	1.15x	0.16x	0.99x	3 (Lower-Mid)	
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Hellman & Friedman Capital Partners IX	2025 Q2	Closed	2019	\$16.52B	+14.19%	1.63x	0.13x	1.50x	3 (Lower-Mid)	47.0
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Hellman & Friedman Capital Partners VIII	2025 Q2	Fully Invested	2016	\$11.05B	+10.66%	1.73x	0.66x	1.07x	4 (Bottom)	41.4
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Hellman & Friedman Capital Partners VII	2025 Q2	Closed	2011	\$8.92B	+24.61%	3.36x	3.28x	0.08x	1 (Top)	65.9
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Hellman & Friedman Capital Partners VI	2025 Q1	Closed	2007	\$8.42B	+13.10%	1.91x	1.82x	0.08x	2 (Upper-Mid)	55.4
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Hellman & Friedman Capital Partners V	2025 Q1	Fully Invested	2004	\$3.50B	+27.80%	2.69x	2.69x	0.00x	1 (Top)	74.0
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Hellman & Friedman Capital Partners IV	2023 Q2	Fully Invested	2000	\$2.50B	+34.80%	2.81x	2.81x	0.00x	1 (Top)	80.3
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Hellman & Friedman Capital Partners III	2021 Q2	Liquidated	1995	\$1.50B	+34.50%	2.29x	2.29x	0.00x		
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Hellman & Friedman Capital Partners II	2021 Q3	Liquidated	1991	\$877.00M	+25.01%	3.03x	3.03x	0.00x		
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Hellman & Friedman Capital Partners I	2014 Q1	Liquidated	1987	\$327.00M	+12.10%	2.10x	2.10x	0.00x		
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Zephyr Partners (1 fund) Buyout | San Francisco, CA

Private Equity

No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	 Fund Performance Score
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Zephyr Partners I		Closed	2023	\$75.00M						
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Wildcat Partners (1 fund) Buyout | San Francisco, CA Private Equity

No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	 Fund Performance Score
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Wildcat Partners I		Closed	2022							
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Mend Partners (2 funds) Buyout | San Francisco, CA Private Equity

No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	 Fund Performance Score
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Mend Partners II		Closed								
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Mend Partners I		Closed	2021							
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Samson Brunello (1 fund) Buyout | San Francisco, CA Private Equity

No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	 Fund Performance Score
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Samson Brunello	2024 Q4	Closed	2021	\$34.96M	+34.03%	2.92x	0.67x	2.25x	1 (Top)	
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Samson Hockey Fund (1 fund) Buyout | San Francisco, CA Private Equity


No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	 Fund Performance Score
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Samson Hockey Fund	2024 Q4	Closed	2021	\$446.35M	+34.74%	2.51x	1.00x	1.51x	1 (Top)	
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Samson Shield Fund (1 fund) Buyout | San Francisco, CA Private Equity

No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	 Fund Performance Score
Samson Shield Fund	2024 Q4	Closed	2020	\$1.14B	+11.42%	1.50x	0.22x	1.27x	3 (Lower-Mid)	

H&F Arrow (1 fund) Buyout | San Francisco, CA Private Equity

No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	 Fund Performance Score
H&F Arrow 1	2024 Q4	Fully Invested	2020	\$38.40M	+21.65%	2.39x	0.08x	2.31x	1 (Top)	


H&F Unite Partners (2 funds) Buyout | San Francisco, CA Private Equity

No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	 Fund Performance Score
H&F Unite Partners II		Closed	2019	\$150.00M						
H&F Unite Partners	2025 Q1	Fully Invested	2019	\$150.00M	+8.40%	1.59x	0.05x	1.54x	4 (Bottom)	

H&F Flashdance Partners (2 funds) Buyout | San Francisco, CA Private Equity

No scores available due to insufficient performance and cashflow data

Fund Name	Data as of	Fund Status	Vintage	Fund Size	IRR	TVPI	DPI	RVPI	IRR Quartile	 Fund Performance Score
H&F Flashdance Partners II		Closed		\$297.82M						
H&F Flashdance Partners I	2025 Q1	Fully Invested	2018	\$492.18M	+17.60%	2.12x	0.98x	1.14x	2 (Upper-Mid)	

Other (6 funds)

Fund Name	Fund Size	Vintage	Fund Status	Fund Location	Fund Type
H&F Clyde Fund	\$35.86M	2024	Closed	San Francisco, CA	Buyout

Fund Name	Fund Size	Vintage	Fund Status	Fund Location	Fund Type
Samson Partners	\$238.80M	2020	Closed	San Francisco, CA	Buyout
H&F Speedster Partners	\$59.97M	2020	Closed	San Francisco, CA	Buyout
Continuation Fund 2020		2020	Closed	San Francisco, CA	Buyout
Continuation Fund 2018		2018	Closed	San Francisco, CA	Buyout
H&F Polaris Partners	\$300.00M	2016	Closed	San Francisco, CA	Buyout

Private Equity (29)

Name	Vintage	Fund Status	Fund Type	Fund Size	Open Date	Close Date	Fund Location	SBIC
Mend Partners II		Closed	Buyout		05-Aug-2021		San Francisco, CA	
H&F Flashdance Partners II		Closed	Buyout	\$297.82M	03-Jul-2018		San Francisco, CA	
H&F Clyde Fund	2024	Closed	Buyout	\$35.86M	07-Feb-2024	31-Dec-2024	San Francisco, CA	
Hellman & Friedman Capital Partners XI	2023	Closed	Buyout	\$22.30B	13-Dec-2022	14-Jul-2023	San Francisco, CA	
Zephyr Partners I	2023	Closed	Buyout	\$75.00M	01-Nov-2022	01-Jan-2023	San Francisco, CA	
Wildcat Partners I	2022	Closed	Buyout		25-Jan-2022	31-Dec-2022	San Francisco, CA	
Samson Brunello	2021	Closed	Buyout	\$34.96M	19-Feb-2021	31-Dec-2021	San Francisco, CA	
Mend Partners I	2021	Closed	Buyout		05-Aug-2021	31-Dec-2021	San Francisco, CA	
Hellman & Friedman Capital Partners X	2021	Closed	Buyout	\$24.40B	22-Jan-2021	15-Jul-2021	San Francisco, CA	
Samson Shield Fund	2020	Closed	Buyout	\$1.14B	18-Dec-2020	01-Jan-2021	San Francisco, CA	
Samson Partners	2020	Closed	Buyout	\$238.80M	30-Oct-2020	01-Jan-2021	San Francisco, CA	
Samson Hockey Fund	2021	Closed	Buyout	\$446.35M	18-Dec-2020	01-Jan-2021	San Francisco, CA	
H&F Speedster Partners	2020	Closed	Buyout	\$59.97M	25-Feb-2020	31-Dec-2020	San Francisco, CA	
Continuation Fund 2020	2020	Closed	Buyout		01-Jan-2020	31-Dec-2020	San Francisco, CA	
H&F Unite Partners II	2019	Closed	Buyout	\$150.00M	30-Apr-2019	31-Dec-2019	San Francisco, CA	
Continuation Fund 2018	2018	Closed	Buyout		01-Jan-2018	31-Dec-2018	San Francisco, CA	
Hellman & Friedman Capital Partners IX	2019	Closed	Buyout	\$16.52B	28-Sep-2018	30-Oct-2018	San Francisco, CA	
H&F Polaris Partners	2016	Closed	Buyout	\$300.00M	14-Jun-2016	31-Dec-2016	San Francisco, CA	

Name	Vintage	Fund Status	Fund Type	Fund Size	Open Date	Close Date	Fund Location	SBIC
Hellman & Friedman Capital Partners VII	2011	Closed	Buyout	\$8.92B	01-Nov-2008	01-Oct-2009	San Francisco, CA	
Hellman & Friedman Capital Partners VI	2007	Closed	Buyout	\$8.42B	01-Mar-2007	17-Apr-2007	San Francisco, CA	
H&F Arrow 1	2020	Fully Invested	Buyout	\$38.40M	25-Aug-2020	31-Dec-2020	San Francisco, CA	
H&F Unite Partners	2019	Fully Invested	Buyout	\$150.00M	30-Apr-2019	31-Dec-2019	San Francisco, CA	
H&F Flashdance Partners I	2018	Fully Invested	Buyout	\$492.18M	03-Jul-2018	31-Dec-2018	San Francisco, CA	
Hellman & Friedman Capital Partners VIII	2016	Fully Invested	Buyout	\$11.05B	24-Sep-2014	10-Nov-2014	San Francisco, CA	
Hellman & Friedman Capital Partners V	2004	Fully Invested	Buyout	\$3.50B	01-Apr-2004	13-Jul-2004	San Francisco, CA	
Hellman & Friedman Capital Partners IV	2000	Fully Invested	Buyout	\$2.50B		01-Jan-2000	San Francisco, CA	
Hellman & Friedman Capital Partners III	1995	Liquidated	Buyout	\$1.50B		01-Jan-1995	San Francisco, CA	
Hellman & Friedman Capital Partners II	1991	Liquidated	Buyout	\$877.00M		01-Jan-1991	San Francisco, CA	
Hellman & Friedman Capital Partners I	1987	Liquidated	Buyout	\$327.00M		01-Jan-1988	San Francisco, CA	

S Secondary Fund
FoF Fund of Funds
CI Co-Investment

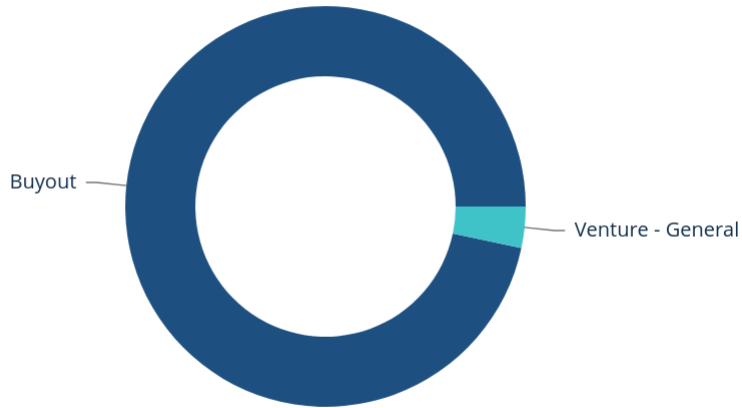
Venture Capital (1)

Name	Vintage	Fund Status	Fund Type	Fund Size	Open Date	Close Date	Fund Location	SBIC
HF Venture Fund I	2024	Closed	Venture - General	\$5.00M	23-Feb-2024	31-Dec-2024	San Francisco, CA	

S Secondary Fund
FoF Fund of Funds
CI Co-Investment

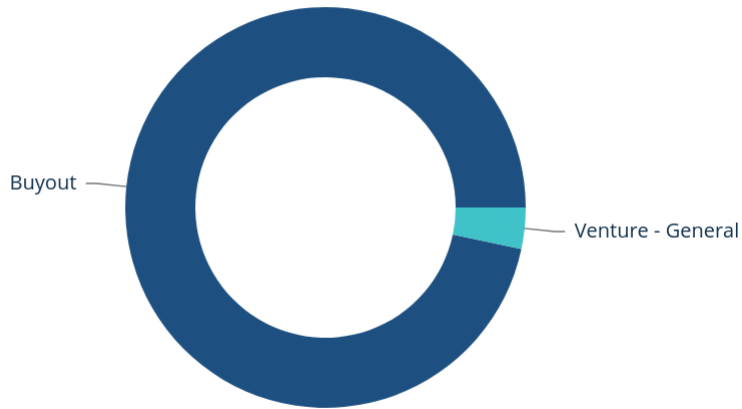
Funds by Type

By Fund Count



Fund Type	Total Fund Count	Total Fund Size
Buyout	29	\$103.78B
Venture - General	1	\$5.00M

By Fund Size



Fund Type	Total Fund Count	Total Fund Size
Buyout	29	\$103.78B
Venture - General	1	\$5.00M

Fund # 30: Mend Partners II

General Information

Fund Manager	Hellman & Friedman	Fund Status	Closed
Access Point	Primary Fund	Fund Lifespan	Finite-Life
Fund Category	Private Equity	Fund Family	Mend Partners
Fund Structure	Drawdown	Fund Native Currency	USD
Exchange Status	Non-Listed	Open Date	05-Aug-2021
Fund Type	Buyout	SBIC	No
Domicile	United States: Delaware	Targets Private Wealth Investors	No

No performance data available

Additional Note:

Mend Partners II is a buyout fund managed by Hellman & Friedman. The fund is located in San Francisco, California.

Contact Information

Fund Managers

Hellman & Friedman

Fund Location

415 Mission Street

Suite 5700

San Francisco, CA 94105

United States

Phone: +1 (415) 788-5111

Fax: +1 (415) 788-0176

info@hf.com

Investment Preferences

Preferred Deal Type

Buyout/LBO

Other Investment Preference

Prefers majority stake

Fund # 29: H&F Flashdance Partners II

General Information

Fund Manager	Hellman & Friedman	Fund Status	Closed
Access Point	Primary Fund	Fund Lifespan	Finite-Life
Fund Category	Private Equity	Fund Family	H&F Flashdance Partners
Fund Structure	Drawdown	Fund Native Currency	USD
Exchange Status	Non-Listed	Open Date	03-Jul-2018
Fund Type	Buyout	SBIC	No
Size	\$297.82M	Targets Private Wealth Investors	No
Domicile	United States: Delaware		

No performance data available

Additional Note:

H&F Flashdance Partners II is a buyout fund managed by Hellman & Friedman. The fund is located in San Francisco, California.

Contact Information**Fund Managers**

Hellman & Friedman

Fund Location

415 Mission Street

Suite 5700

San Francisco, CA 94105

United States

Phone: +1 (415) 788-5111

Fax: +1 (415) 788-0176

info@hf.com

Limited Partners (1)

Limited Partner	Type	Status	Commitment	Date	Commitment Type	Comments
Teacher Retirement System of Texas	Public Pension Fund	Current	\$25.00M	08-Aug-2018	Original	

Investment Preferences**Preferred Industries**

Commercial Services, Insurance

Preferred Deal Type

Buyout/LBO

Other Investment Preference

Prefers majority stake

Benchmark

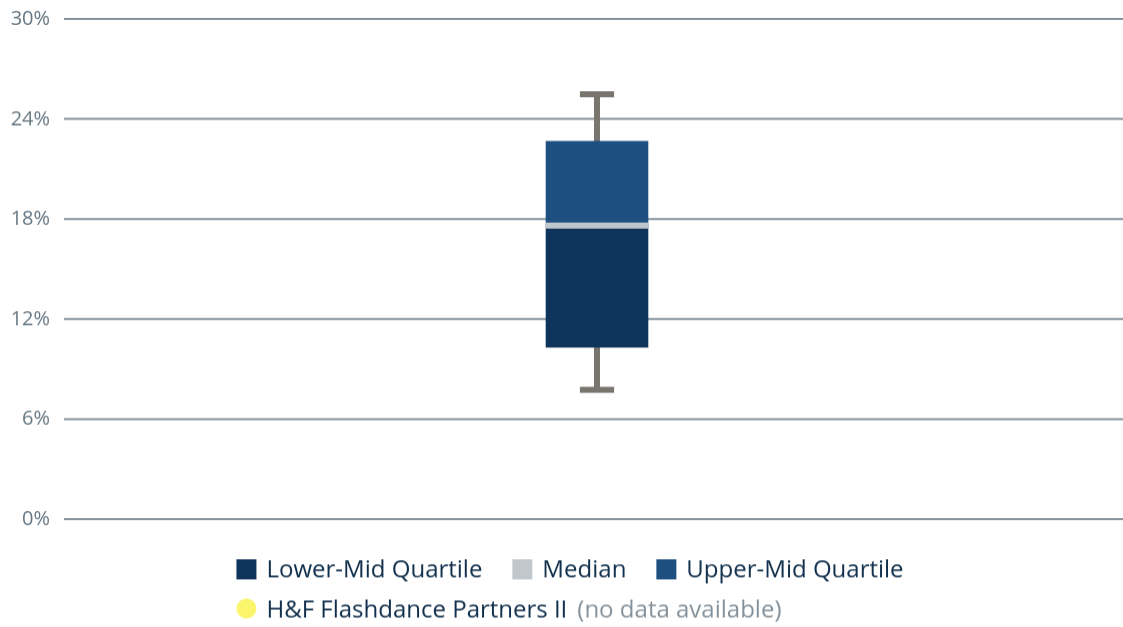
Methodology Data as of: **2025 Q2**

 **PitchBook Benchmark:** **Vintage:** 2018; **Access Point:** Primary Fund; **Fund Category:** Private Equity;

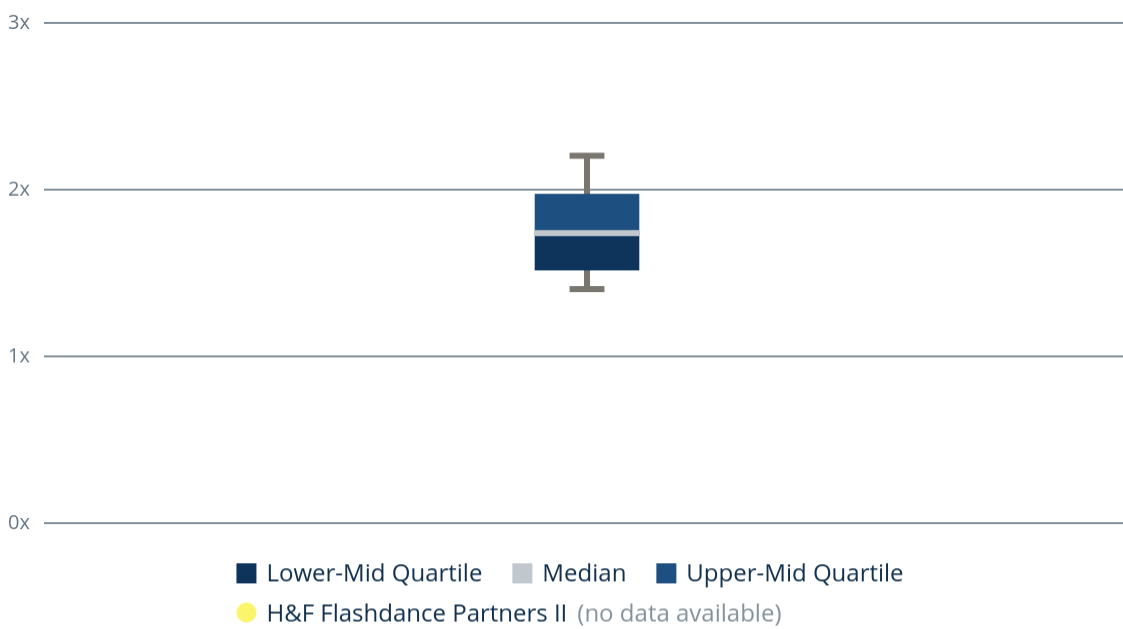
Fund Location: North America; **Fund Size:** \$250M - \$499M;

Performance Benchmark

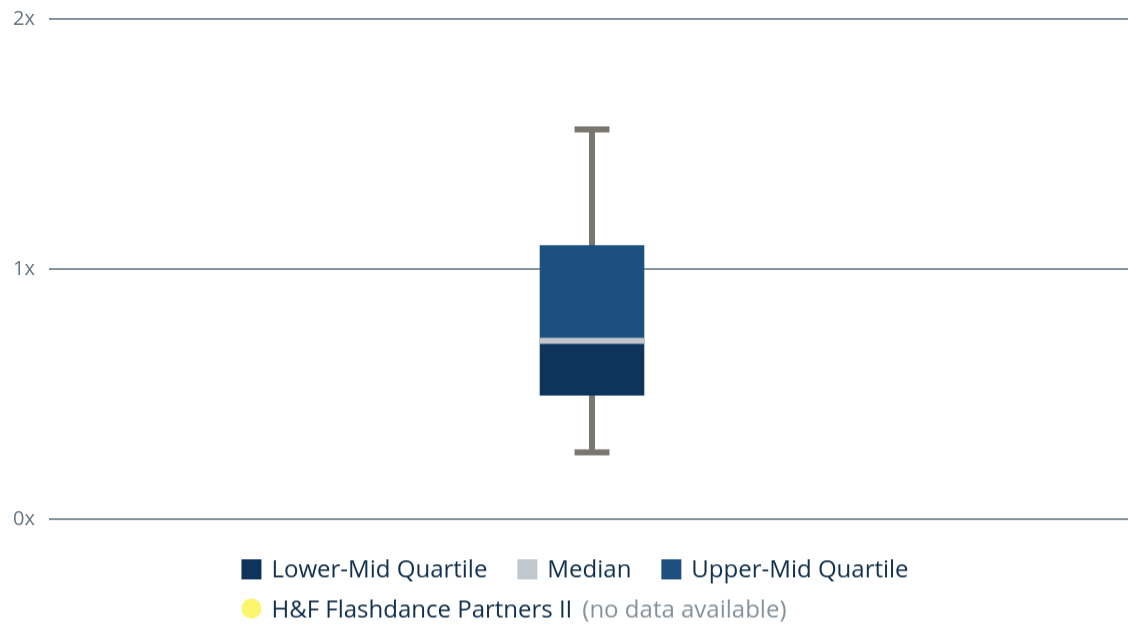
IRR



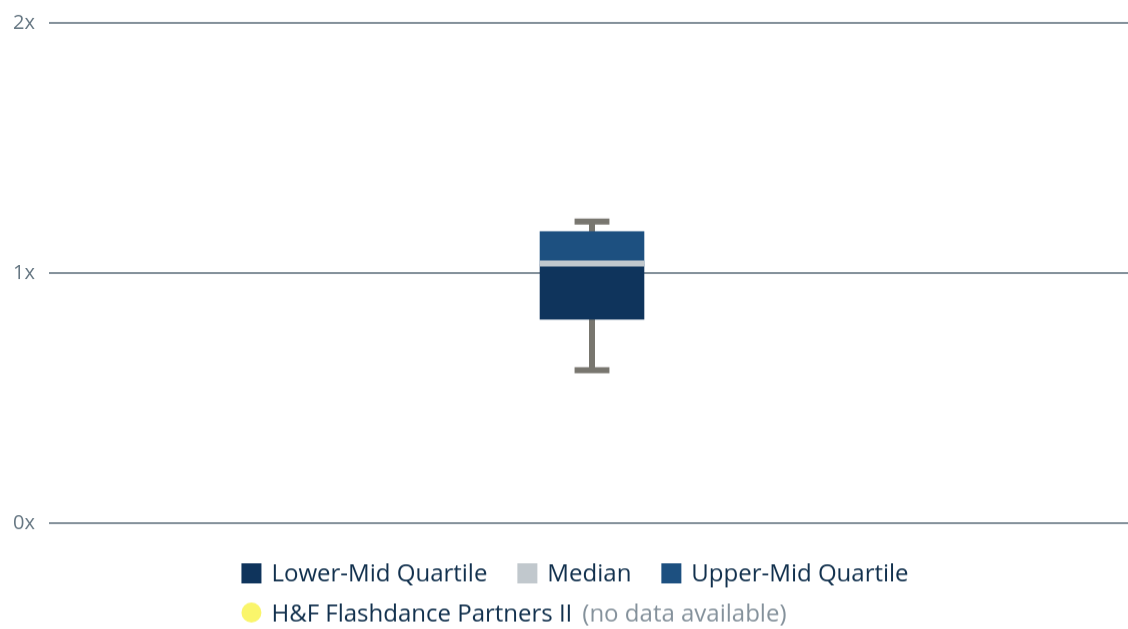
TVPI



|| DPI



|| RVPI



Benchmark Summary

17.60%	1.74x	0.71x	1.04x	5.45%
IRR	TVPI	DPI	RVPI	Dry Powder

Metric	Top Decile	Top Quartile	Median	Bottom Quartile	Bottom Decile	Total Funds
IRR	+25.48%	+22.68%	+17.60%	+10.29%	+7.75%	17
TVPI	2.20x	1.97x	1.74x	1.52x	1.40x	17
DPI	1.56x	1.10x	0.71x	0.49x	0.27x	17
RVPI	1.21x	1.17x	1.04x	0.81x	0.61x	17

Peer Group

Constituent Funds (17)

Funds that meet all of the benchmark criteria (i.e. Vintage, Access Point, Fund Category, Fund Location and Fund Size) and PitchBook’s Benchmarking [Methodology](#)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
ABS Capital Partners VIII	2018	Growth/Expansion	Washington, DC	\$275.00M	+19.30%	1.83x	0.65x	1.18x				2 (Upper-Mid)
Ara Fund I	2018	Buyout	Houston, TX	\$396.11M	+0.74%	1.18x	0.70x	0.48x				4 (Bottom)
Banc Fund X	2018	Growth/Expansion	Chicago, IL	\$356.73M	+5.70%	1.31x	0.13x	1.18x				4 (Bottom)
Carrick Capital Partners III	2018	Buyout	San Francisco, CA	\$400.00M	+10.29%	1.46x	0.53x	0.93x				3 (Lower-Mid)
ECP Helios Partners IV	2018	Buyout	New York, NY	\$286.86M	+13.47%	2.15x	2.14x	0.01x				3 (Lower-Mid)
Frontenac XI Private Capital	2018	Buyout	Chicago, IL	\$332.00M	+39.86%	3.20x	2.19x	1.01x	9.09%			1 (Top)
Gallant Capital Partners I	2018	Buyout	Los Angeles, CA	\$378.00M	+18.39%	1.53x	0.49x	1.04x				2 (Upper-Mid)
GenNx360 Capital Partners III	2018	Buyout	New York, NY	\$466.00M	+24.60%	1.95x	0.71x	1.24x				1 (Top)
GTB Capital Partners II	2018	Buyout	New York, NY	\$400.00M	+9.12%	1.55x	0.85x	0.70x	0.00%			4 (Bottom)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
H&F Flashdance Partners I	2018	Buyout	San Francisco, CA	\$492.18M	+17.60%	2.12x	0.98x	1.14x				2 (Upper-Mid)
Hidden Harbor Capital Partners I	2018	Buyout	Boca Raton, FL	\$265.00M	+26.80%	1.74x	0.93x	0.81x				1 (Top)
Juggernaut Capital Partners IV	2018	Buyout	Washington, DC	\$408.00M	+14.77%	1.71x	0.18x	1.53x	1.81%			3 (Lower-Mid)
MiddleGround Partners I	2018	Buyout	Lexington, KY	\$459.50M	+21.90%	1.97x	1.10x	0.88x	13.17%	2.00%	20.00%	2 (Upper-Mid)
Motive Capital Fund I	2018	Buyout	New York, NY	\$485.10M	+23.10%	2.28x	1.17x	1.11x				1 (Top)
New State Capital Partners Fund II	2018	Buyout	New Rochelle, NY	\$255.00M	+14.85%	1.52x	0.39x	1.12x				3 (Lower-Mid)
Next Investors II	2018	Growth/Expansion	New York, NY	\$261.00M	+22.68%	1.87x	1.13x	0.74x				1 (Top)
Tritium II	2018	Buyout	Austin, TX	\$465.00M	+10.00%	1.49x	0.33x	1.17x				4 (Bottom)

All Peers (54)

All Funds with and without requisite performance data that meet all of the benchmark criteria (i.e. Vintage, Access Point, Fund Category, Fund Location and Fund Size) regardless of PitchBook's Benchmarking [Methodology](#)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
H&F Flashdance Partners II	2018	Buyout	San Francisco, CA	\$297.82M								
1315 Capital Fund II	2018	Growth/Expansion	Philadelphia, PA	\$300.00M								
ABS Capital Partners VIII	2018	Growth/Expansion	Washington, DC	\$275.00M	+19.30%	1.83x	0.65x	1.18x				2 (Upper-Mid)
Aldrich Capital Partners Fund I	2018	Buyout	Vienna, VA	\$256.00M								
Alliance Consumer Growth Fund IV	2018	Growth/Expansion	New York, NY	\$350.00M								
Ampersand 2018	2018	Growth/Expansion	Boston, MA	\$450.00M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Ara Fund I	2018	Buyout	Houston, TX	\$396.11M	+0.74%	1.18x	0.70x	0.48x				4 (Bottom)
Aretex Capital Partners Fund	2018	Buyout	New York, NY	\$325.00M								
Argonaut Private Equity Fund IV	2018	Buyout	Tulsa, OK	\$400.00M								
Arrowhead Capital Fund III	2018	Buyout	Greenwich, CT	\$296.20M								
Aterian Investment Partners III	2018	Buyout	New York, NY	\$355.00M								
Banc Fund X	2018	Growth/Expansion	Chicago, IL	\$356.73M	+5.70%	1.31x	0.13x	1.18x				4 (Bottom)
BBH Capital Partners Opportunities Fund	2018	Buyout	New York, NY	\$250.00M								
Beecken Petty O'Keefe & Company Fund V	2018	Buyout	Chicago, IL	\$400.00M								
Beekman Investment Partners IV	2018	Buyout	New York, NY	\$425.00M								
BP Natural Gas Opportunity Partners II	2018	Growth/Expansion	Dallas, TX	\$348.00M								
Carlyle Private Equity Access Fund IV	2018	Buyout	Washington, DC	\$313.72M								
Carrick Capital Partners III	2018	Buyout	San Francisco, CA	\$400.00M	+10.29%	1.46x	0.53x	0.93x				3 (Lower-Mid)
CAZ Private Equity Ownership Fund II	2018	Buyout	Houston, TX	\$354.00M								
Cordillera Investment Fund II	2018	Growth/Expansion	San Francisco, CA	\$362.24M								
ECP Helios Partners IV	2018	Buyout	New York, NY	\$286.86M	+13.47%	2.15x	2.14x	0.01x				3 (Lower-Mid)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Enlightenment Capital Solutions Fund III	2018	Growth/Expansion	Chevy Chase, MD	\$250.00M								
Falcon Structured Equity Partners Fund	2018	Buyout	Boston, MA	\$288.70M								
Florida Regional Center I	2018	Buyout	New York, NY	\$383.05M								
Frontenac XI Private Capital	2018	Buyout	Chicago, IL	\$332.00M	+39.86%	3.20x	2.19x	1.01x	9.09%			1 (Top)
Further Global Capital Partners	2018	Buyout	New York, NY	\$443.66M								
Gallant Capital Partners I	2018	Buyout	Los Angeles, CA	\$378.00M	+18.39%	1.53x	0.49x	1.04x				2 (Upper-Mid)
GenNx360 Capital Partners III	2018	Buyout	New York, NY	\$466.00M	+24.60%	1.95x	0.71x	1.24x				1 (Top)
GTB Capital Partners II	2018	Buyout	New York, NY	\$400.00M	+9.12%	1.55x	0.85x	0.70x	0.00%			4 (Bottom)
H&F Flashdance Partners I	2018	Buyout	San Francisco, CA	\$492.18M	+17.60%	2.12x	0.98x	1.14x				2 (Upper-Mid)
Hidden Harbor Capital Partners I	2018	Buyout	Boca Raton, FL	\$265.00M	+26.80%	1.74x	0.93x	0.81x				1 (Top)
HKW Capital Partners V	2018	Buyout	Indianapolis, IN	\$365.00M								
Indiana Next Level Fund	2018	Buyout	Chicago, IL	\$250.00M								
India Resurgent Fund	2018	Restructuring/Turnaround	Boston, MA	\$325.00M								
Inovia Capital Growth Fund I	2018	Growth/Expansion	Montreal, Canada	\$413.31M								
Juggernaut Capital Partners IV	2018	Buyout	Washington, DC	\$408.00M	+14.77%	1.71x	0.18x	1.53x	1.81%			3 (Lower-Mid)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
LACERA JP Morgan Emerging Managers Program IV	2018	Buyout	New York, NY	\$300.00M								
MiddleGround Partners I	2018	Buyout	Lexington, KY	\$459.50M	+21.90%	1.97x	1.10x	0.88x	13.17%	2.00%	20.00%	2 (Upper-Mid)
Motive Capital Fund I	2018	Buyout	New York, NY	\$485.10M	+23.10%	2.28x	1.17x	1.11x				1 (Top)
NCP Fund I	2018	Buyout	Boston, MA	\$386.23M								
New State Capital Partners Fund II	2018	Buyout	New Rochelle, NY	\$255.00M	+14.85%	1.52x	0.39x	1.12x				3 (Lower-Mid)
Next Investors II	2018	Growth/Expansion	New York, NY	\$261.00M	+22.68%	1.87x	1.13x	0.74x				1 (Top)
NovaQuest Private Equity Fund I	2018	Buyout	Raleigh, NC	\$275.00M								
Paragon Outcomes Fund II	2018	Buyout	New York, NY	\$454.99M								
ParkerGale Capital II	2018	Buyout	Chicago, IL	\$375.00M						2.00%	20.00%	
PeakSpan Capital Growth Partners II	2018	Growth/Expansion	San Mateo, CA	\$285.00M								
Prospect Hill Growth Fund II	2018	Buyout	Waltham, MA	\$380.00M								
RF Investment Partners SBIC	2018	Growth/Expansion	New York, NY	\$284.00M								
Rosemawr Capital III	2018	Buyout	Miami Beach, FL	\$300.00M								
SLA Private Investors	2018	Buyout	New York, NY	\$280.68M								
Soundcore Capital Partners Fund II	2018	Buyout	New York, NY	\$350.00M								
Trinity Hunt Partners V	2018	Growth/Expansion	Dallas, TX	\$350.00M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Tritium II	2018	Buyout	Austin, TX	\$465.00M	+10.00%	1.49x	0.33x	1.17x				4 (Bottom)

Warren Equity Partners Fund II	2018	Buyout	Jacksonville Beach, FL	\$310.00M								
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Fund # 28: HF Venture Fund I

General Information

Fund Manager	Hellman & Friedman	Fund Status	Closed
Access Point	Primary Fund	Fund Lifespan	Finite-Life
Fund Category	Venture Capital	Fund Family	HF Venture Fund
Exchange Status	Non-Listed	Fund Native Currency	USD
Fund Type	Venture - General	Open Date	23-Feb-2024
Size	\$5.00M	Close Date	31-Dec-2024
Vintage	2024	SBIC	No
Domicile	Cayman Islands	Targets Private Wealth Investors	No

No performance data available

Additional Note:

HF Venture Fund I is a venture capital fund managed by Hellman & Friedman. The fund is located in an Francisco, California.

Contact Information

Fund Managers	Fund Location
Hellman & Friedman	415 Mission Street
	Suite 5700
	San Francisco, CA 94105
	United States
	Phone: +1 (415) 788-5111
	Fax: +1 (415) 788-0176
	info@hf.com

Investment Preferences

Preferred Deal Types

Early Stage VC, Later Stage VC, Seed Round

Other Investment Preferences

Prefers minority stake, Will syndicate

Fund # 27: H&F Clyde Fund

General Information

Fund Manager	Hellman & Friedman	Fund Native Currency	USD
Access Point	Primary Fund	Open Date	07-Feb-2024
Fund Category	Private Equity	Close Date	31-Dec-2024
Fund Structure	Drawdown	SBIC	No
Exchange Status	Non-Listed	Targets Private Wealth	No
Fund Type	Buyout	Investors	
Size	\$35.86M	Dry Powder	\$0.00 <i>(as of 31-Dec-2024)</i>
Vintage	2024	% Dry Powder	0.00%
Domicile	United States: Delaware	NAV	\$41.61M <i>(as of 31-Dec-2024)</i>
Fund Status	Closed	Distribution	\$0.00 <i>(as of 31-Dec-2024)</i>
Fund Lifespan	Finite-Life	Distribution + NAV	\$41.61M <i>(as of 31-Dec-2024)</i>
		Total Called In	\$36.03M <i>(as of 31-Dec-2024)</i>

Performance Overview <small>(As of 4Q2024)</small>	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
H&F Clyde Fund	\$35.86M	+15.50%	1.15x	0.00x	1.15x	0.00%	-	-	-
Benchmark (15 Funds)	\$125.00M (median)	+8.90%	1.15x	0.00x	1.14x	81.01%	-	-	-
H&F Clyde Fund vs Benchmark	-\$89.14M	+6.60%	+0.01x	0.00x	+0.01x	-81.01%	-	-	1 (Top)

Additional Note:

H&F Clyde Fund is a buyout fund managed by Hellman & Friedman. The fund is located in San Francisco, California.

Contact Information

Fund Managers

Hellman & Friedman

Fund Location

415 Mission Street

Suite 5700

San Francisco, CA 94105

United States

Phone: +1 (415) 788-5111

Fax: +1 (415) 788-0176

info@hf.com

Fund Service Providers

Service Provider Name	Service Provided	Service To	Comments
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	

Gen II Fund Services	Fund Administrator	Investor - Hellman & Friedman	
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Limited Partners (4)

Limited Partner	Type	Status	Commitment	Date	Commitment Type	Comments
Alaska Retirement Management Board	Public Pension Fund	Current		31-Dec-2024	Original	
California Public Employees' Retirement System	Public Pension Fund		\$35.86M	31-Dec-2024	Original	
Indiana Public Retirement System	Public Pension Fund	Current		31-Dec-2024	Original	
Massachusetts Pension Reserves Investment Trust	Public Pension Fund	Current		31-Dec-2024	Original	

Investment Preferences

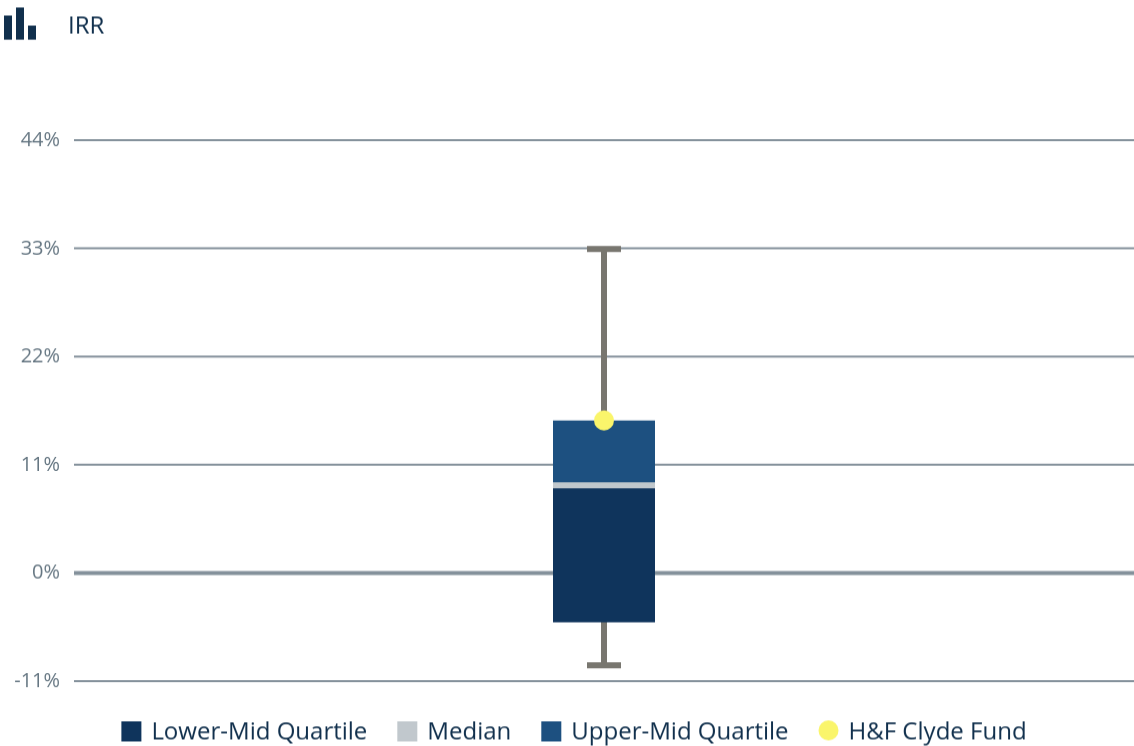
Preferred Deal Type	Other Investment Preference
Buyout/LBO	Prefers majority stake

Fund Returns History

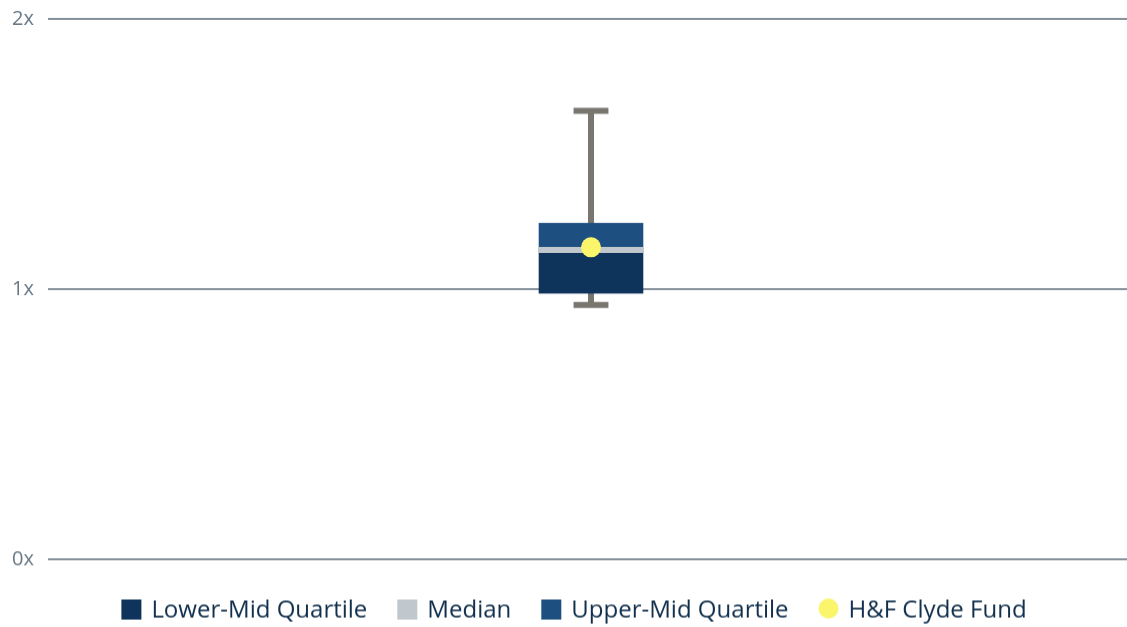
Period	Contribution (by all LPs)	Dry Powder	Distribution (to all LPs)	NAV	Total Fund Distr+NAV	IRR	DPI	RVPI	TVPI	Dry Powder %
4Q24	36.03	0.00	0.00	+41.61	+41.61	+15.50%	0.00x	1.15x	1.15x	0.00%
3Q24	36.03	0.00	0.00	+39.71	+39.71	+10.23%	0.00x	1.10x	1.10x	0.00%
2Q24	36.03	0.00	0.00	+39.67	+39.67	+10.10%	0.00x	1.10x	1.10x	0.00%
1Q24	36.03	0.00	0.00	+39.70	+39.70		0.00x	1.10x	1.10x	0.00%

PitchBook Benchmark: Vintage: 2024; Access Point: Primary Fund; Fund Category: Private Equity;
Fund Location: North America; **Fund Size:** \$0M - \$249M;

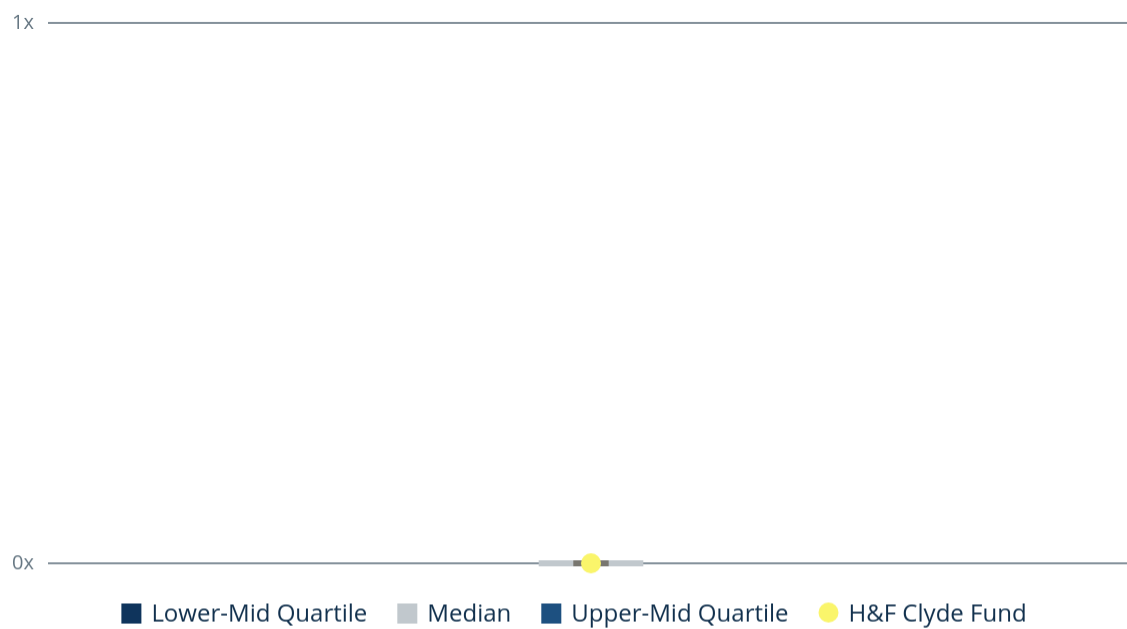
Performance Benchmark



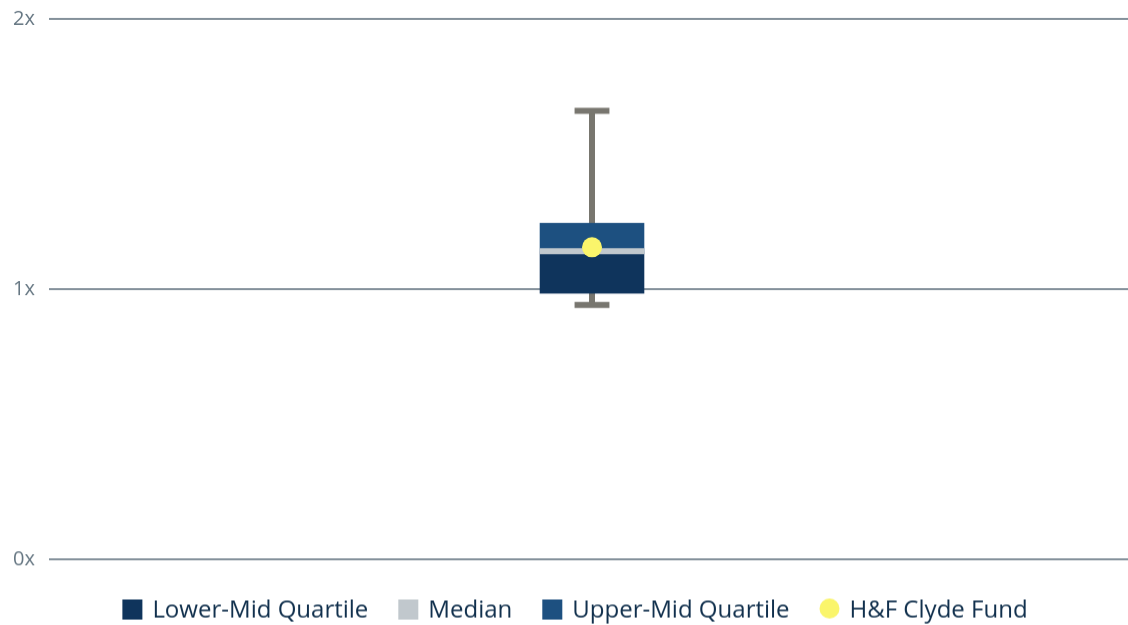
TVPI



DPI



RVPI



Benchmark Summary

8.90% IRR	1.15x TVPI	0.00x DPI	1.14x RVPI	81.01% Dry Powder
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Metric	Top Decile	Top Quartile	Median	Bottom Quartile	Bottom Decile	Total Funds
IRR	+32.93%	+15.50%	+8.90%	-5.02%	-9.39%	5
TVPI	1.66x	1.25x	1.15x	0.98x	0.94x	11
DPI	0.00x	0.00x	0.00x	0.00x	0.00x	15
RVPI	1.66x	1.25x	1.14x	0.98x	0.94x	11

Peer Group

Constituent Funds (15)

Funds that meet all of the benchmark criteria (i.e. Vintage, Access Point, Fund Category, Fund Location and Fund Size) and PitchBook's Benchmarking [Methodology](#)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
H&F Clyde Fund	2024	Buyout	San Francisco, CA	\$35.86M	+15.50%	1.15x	0.00x	1.15x	0.00%			1 (Top)
5th Century Partners Fund II	2024	Buyout	Chicago, IL	\$217.10M	-12.30%	0.93x	0.00x	0.93x	83.71%			4 (Bottom)
Arroyo Dunamis Direct Investment I	2024	Buyout	Houston, TX	\$233.10M		1.90x	0.00x	1.90x	0.00%			
BP Opportunities Partners III	2024	Growth/Expansion	Dallas, TX	\$125.00M	-5.02%	0.94x	0.00x	0.94x	69.83%			3 (Lower-Mid)
CF Private Equity Environmental Solutions Partners II	2024	Buyout	Wilton, CT	\$106.60M		1.19x	0.00x	1.19x				
Cohere Capital Fund II	2024	Buyout	Boston, MA	\$215.00M			0.00x		100.00%			
Estancia Capital Partners Fund III	2024	Buyout	Scottsdale, AZ	\$180.32M		0.97x	0.00x	0.97x				
Farol Fund III	2024	Buyout	New York, NY	\$37.09M		1.15x	0.01x	1.14x				
Hamilton Lane Impact Fund III	2024	Diversified Private Equity	Conshohocken, PA	\$114.51M			0.00x		100.00%			
Lime Rock New Energy II	2024	Growth/Expansion	Westport, CT	\$12.00M			0.00x		100.00%			
LongueVue Capital Partners Sidecar I	2024	Growth/Expansion	New Orleans, LA	\$94.00M	+44.55%	1.30x	0.00x	1.30x	80.35%			1 (Top)
Prysm Capital Fund II	2024	Growth/Expansion	Princeton, NJ	\$220.10M		1.66x	0.00x	1.66x	53.26%			
Rock Island Capital Fund IV	2024	Buyout	Oak Brook, IL	\$240.00M		1.00x	0.00x	1.00x	81.67%			
SEP Diamond Fund	2024	Buyout	Los Angeles, CA	\$120.00M	+8.90%	1.09x	0.00x	1.09x	10.40%			2 (Upper-Mid)
TigerMax Partners	2024	Buyout	New York, NY	\$125.00M			0.00x		100.00%			

All Peers (511)

All Funds with and without requisite performance data that meet all of the benchmark criteria (i.e. Vintage, Access Point, Fund Category, Fund Location and Fund Size) regardless of PitchBook’s Benchmarking Methodology

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
H&F Clyde Fund	2024	Buyout	San Francisco, CA	\$35.86M	+15.50%	1.15x	0.00x	1.15x	0.00%			1 (Top)
10K Lakes Fund III	2024	Growth/Expansion	Bloomington, MN	\$57.50M								
1789 Capital Odyssey	2024	Buyout	Palm Beach, FL	\$17.50M								
1789 Capital RO	2024	Buyout	Palm Beach, FL	\$13.75M								
24 Acquisition		Buyout	New York, NY	\$56.50M								
400 Capital JSIF IV	2024	Buyout	New York, NY	\$144.32M								
50T Fund IV	2024	Growth/Expansion	New York, NY	\$41.80M						2.00%	20.00%	
5th Century Partners Fund II	2024	Buyout	Chicago, IL	\$217.10M	-12.30%	0.93x	0.00x	0.93x	83.71%			4 (Bottom)
A16Z - Allocate 2024 Fund	2024	Buyout	Menlo Park, CA	\$64.53M								
Abacus Finance SBIC Fund I	2024	Buyout	New York, NY	\$48.60M								
Abacus Fund 1	2024	Buyout	Birmingham, AL	\$67.05M								
AB CVI Aviation Income Fund II	2024	Buyout	Minneapolis, MN	\$52.58M								
ABRY Partners X	2024	Buyout	Boston, MA	\$50.00M								
ABS Capital Partners IX	2024	Growth/Expansion	Washington, DC	\$87.96M								
Access Holdings Endurance Fund	2024	Buyout	Baltimore, MD	\$92.90M						1.00%	20.00%	
Access Sports Endurance Fund		Buyout	Baltimore, MD	\$136.30M						1.00%		
Activant Capital V	2024	Growth/Expansion	Greenwich, CT	\$200.41M								
AdCap Growth Partners Fund	2024	Growth/Expansion	Pepper Pike, OH	\$2.15M								
AI Growth Fund	2024	Growth/Expansion	Arlington, VA	\$158.36M								
AI Healthcare Capital Fund I	2024	Growth/Expansion	The Woodlands, TX	\$150.00M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
AI Infrastructure Fund	2024	Buyout	Mountain View, CA	\$2.05M								
AIP EIS	2024	Buyout	Houston, TX	\$14.23M								
AKKR Members Fund 2024	2024	Buyout	Menlo Park, CA	\$2.07M								
All Tides Capital Fund I	2024	Buyout	Jacksonville, FL	\$3.41M								
Alpine Street	2024	Buyout	Nashville, TN	\$25.00M								
AltAlpha Vintage	2024	Buyout	New York, NY	\$11.61M								
Altera Defense Fund 2	2024	Buyout	Atlanta, GA	\$13.25M								
Altera General Partner Ownership Fund	2024	Buyout	Atlanta, GA	\$52.20M								
Amberjack Energy CV	2024	Buyout	Houston, TX	\$200.00M								
American Discovery Fund II	2024	Buyout	Los Angeles, CA	\$190.00M								
Anchor Capital Growth Fund I	2024	Growth/Expansion	Dallas, TX	\$13.75M								
Andalusian Direct Partners II	2024	Buyout	New York, NY	\$11.13M								
Andalusian Principal Partners	2024	Buyout	Greenwich, CT	\$14.50M								
Angeleno Investors IV	2024	Growth/Expansion	Los Angeles, CA	\$118.64M								
APC Asset Development II	2024	Buyout	Newport Beach, CA	\$160.00M								
Aracari Fund	2024	Growth/Expansion	Dallas, TX	\$25.50M								
Arcalis Toesca Private Equity Fund	2024	Buyout		\$40.00M								
Arch Uinta		Buyout	Dallas, TX	\$8.80M								
Arctaris Opportunity Zone Fund 2024	2024	Diversified Private Equity	Wellesley, MA	\$11.11M								
Arctos American Football Fund	2024	Buyout	Dallas, TX	\$70.00M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Ardlussa Opportunities Fund I	2024	Buyout	Cincinnati, OH	\$85.76M								
Arenova Capital Fund I	2024	Buyout	Dallas, TX	\$27.81M								
Argosy Healthcare Partners I	2024	Buyout	Wayne, PA	\$40.65M								
Arroyo Dunamis Direct Investment I	2024	Buyout	Houston, TX	\$233.10M		1.90x	0.00x	1.90x	0.00%			
Arsenal Growth Equity IV	2024	Growth/Expansion	Winter Park, FL	\$150.00M								
Artemis Capital Partners IV	2024	Buyout	Boston, MA	\$75.00M								
Ascher VIII Capital	2024	Buyout	Madison, MS	\$1.04M								
Ashwood 2024 Private Investment III - Imprint	2024	Buyout	Baltimore, MD	\$4.61M								
Ashwood 2024 Private Investment II - Transom IV	2024	Buyout	Baltimore, MD	\$10.65M								
Astor Place Direct Investors IV	2024	Buyout	New York, NY	\$89.70M								
Atlas Grove Special Opportunities II	2024	Buyout	Miami, FL	\$21.24M								
Attinger Private Equity 2023	2024	Buyout	Philadelphia, PA	\$11.88M								
AUA Private Equity Fund III	2024	Buyout	West Palm Beach, FL	\$241.00M								
Avenue Growth Partners Fund II	2024	Growth/Expansion	Washington, DC	\$125.00M								
AV Growth Fund 4	2024	Growth/Expansion	Manchester, NH	\$121.00K								
A-VLA Investments	2024	Buyout	Washington, DC	\$7.44M								
AWP Diversity Fund II	2024	Diversified Private Equity	Flower Mound, TX	\$150.00M								
Bain Capital Fund XIV	2024	Buyout	Boston, MA	\$170.00M						1.50%	20.00%	
Bansk Fund II	2024	Buyout	New York, NY	\$50.00M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
BaronxAI Fund	2024	Growth/Expansion	New York, NY	\$73.83M								
Baseline Fitness Mayfair	2024	Buyout	Indianapolis, IN	\$168.39M								
BBK Ventures Fund I	2024	Growth/Expansion	Dallas, TX	\$26.38M								
B Capital Watermark 2024 Fund	2024	Buyout	Harleysville, PA	\$8.54M								
BDIP Fund II	2024	Buyout	Raleigh, NC	\$159.48M								
Beach Investment Fund II	2024	Buyout	Charleston, SC	\$80.80M								
Begin Mack		Buyout	Dallas, TX	\$4.10M								
Belmont Partners Fund	2024	Buyout	Philadelphia, PA	\$150.57M								
Bergamot Squad Up	2024	Buyout	Princeton, NJ	\$150.00K								
Beta AIV-S	2024	Buyout	New York, NY	\$725.00K								
Big League Advance Fund IV	2024	Buyout	Fairfax, VA	\$5.93M								
BIP Tioga Partners IV	2024	Buyout	Atlanta, GA	\$7.65M								
BIP Ventures Annex Fund 5	2024	Buyout	Atlanta, GA	\$26.99M								
BIP Ventures Joymo Equity II	2024	Buyout	Atlanta, GA	\$120.00K								
BlackRock Private Equity Impact Capital (Lux) Fund		Buyout	New York, NY	\$1.00M								
Blue Highway Growth Capital Fund II	2024	Growth/Expansion	Philadelphia, PA	\$47.75M								
Blue Ridge Repair Aggregator	2024	Buyout	Walnut Creek, CA	\$36.16M								
Blue Water CentrePark West Partners Fund	2024	Buyout	Boca Raton, FL	\$17.31M								
BLV Fund 1	2024	Buyout	Charleston, SC	\$25.00M								
Boots	2024	Buyout	Houston, TX	\$32.40M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Boulder Top	2024	Buyout	Houston, TX	\$7.84M								
Bourbon Capital 1	2024	Buyout	Atlanta, GA	\$3.22M								
BP Fund	2024	Buyout	Guaynabo, PR	\$97.54M								
BP Opportunities Partners III	2024	Growth/Expansion	Dallas, TX	\$125.00M	-5.02%	0.94x	0.00x	0.94x	69.83%			3 (Lower-Mid)
BrandyTrust Special Assets Partners	2024	Buyout	Hockessin, DE	\$80.56M								
Bridge Buyout Fund I	2024	Buyout	Brooklyn, NY	\$775.00K								
Brighton Micro-Cap Fund II	2024	Buyout	Atlanta, GA	\$30.00M								
Broker Investment Collective	2024	Growth/Expansion	Philadelphia, PA	\$1.30M								
Brown Advisory Blackbird Investors	2024	Buyout	Baltimore, MD	\$152.50M								
Brown Advisory Blackbird Investors 2	2024	Buyout	Baltimore, MD	\$22.08M								
Brydon Fund II	2024	Buyout	Washington, DC	\$170.00M								
BTK-BERK-XI	2024	Buyout	Miami, FL	\$18.05M								
BT New Century Fund	2024	Buyout	Dallas, TX	\$4.52M						2.00%		
BT Select Fund VI	2024	Buyout	Dallas, TX	\$1.64M								
Cabot MM Partners	2024	Buyout	New York, NY	\$28.00M								
Cadian Master Software Opportunities Fund	2024	Buyout	New York, NY	\$11.96M								
CAIS ICG Strategic Equity V	2024	Buyout	New York, NY	\$39.20M								
CAIS Mercer Private Equity Vintage Fund IV	2024	Buyout	New York, NY	\$7.28M								
Calamos Aksia Private Equity Fund	2024	Buyout	Naperville, IL	\$20.48M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
CanAm Texas Regional Center IV	2024	Buyout	New York, NY	\$104.01M								
Candice Venture Fund	2024	Buyout	Naples, FL	\$2.00M								
Capital Allocation Strategies Fund	2024	Buyout	Mountain View, CA	\$47.90M								
Capital Allocation Strategies II	2024	Buyout	Mountain View, CA	\$8.41M								
Caprock Impact Partners I	2024	Buyout	Boise, ID	\$42.44M								
Carbon FP Aggregator Fund	2024	Buyout	Chicago, IL	\$16.22M								
CARE Investment Partners	2024	Buyout	San Diego, CA	\$6.85M								
Carmine Partners Fund	2024	Buyout	Oakland Gardens, NY	\$17.50M								
Carob Financial Fund	2024	Buyout	Dallas, TX	\$38.00M								
Carroll Street Capital Investments I	2024	Buyout	New York, NY	\$25.25M								
Catalyst Investors CF	2024	Growth/Expansion	New York, NY	\$140.00M								
CAZ Private Equity Ownership D6 Fund	2024	Buyout	Houston, TX	\$500.00K								
CC - Addition Five	2024	Buyout	Boulder, CO	\$5.95M								
Ceros MedTech Fund I	2024	Buyout	Rockville, MD	\$5.01M								
CF Private Equity Environmental Solutions Partners II	2024	Buyout	Wilton, CT	\$106.60M		1.19x	0.00x	1.19x				
Chapel Bridge Fund I	2024	Buyout	San Juan, PR	\$2.33M						1.00%		
Charger Diamond Aggregator	2024	Buyout	El Segundo, CA	\$71.50M								
Chart National II	2024	Buyout	Greenwich, CT	\$48.47M								
CHIEF Capital Water Fund	2024	Buyout	New York, NY	\$6.63M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
CH-IP Direct Investment Fund III	2024	Growth/Expansion	Dallas, TX	\$87.20M								
Churchill MPD Fund II		Buyout	New York, NY	\$25.00M								
Circle Oak Acquisitions Fund I	2024	Buyout	New York, NY	\$1.40M								
Class VI Accelerator Fund I	2024	Buyout	Stamford, CT	\$30.31M								
CLC AI	2024	Buyout	New York, NY	\$17.99M								
CLRS X	2024	Buyout	New York, NY	\$197.49M								
CMWA Private Equity 2024	2024	Buyout	Beachwood, OH	\$81.48M								
CMWA Private Opportunities III	2024	Buyout	Beachwood, OH	\$222.80M								
CM Wealth Private Investment Strategies	2024	Buyout	Beachwood, OH	\$7.91M								
Coastal Bonita Springs BlueGate Fund	2024	Buyout	Winter Park, FL	\$4.78M								
Coastal Canton MF Fund	2024	Buyout	Winter Park, FL	\$7.70M								
Coastal Car Wash GP Fund	2024	Buyout	Winter Park, FL	\$8.26M								
Coastal Growth Fund IV	2024	Growth/Expansion	Winter Park, FL	\$10.74M								
Coastal Growth Fund V	2024	Growth/Expansion	Winter Park, FL	\$575.00K								
Coastal Mill Green QC Fund IX	2024	Buyout	Winter Park, FL	\$1.55M								
Coastal Nashville BFR Fund	2024	Buyout	Winter Park, FL	\$5.37M								
Coastal Scottsdale SLF Fund	2024	Buyout	Winter Park, FL	\$5.50M								
Coast Opportunities Fund II	2024	Buyout	Charleston, SC	\$9.70M								
Cohere Capital Fund II	2024	Buyout	Boston, MA	\$215.00M			0.00x		100.00%			

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
COinvest Fund One	2024	Diversified Private Equity	Denver, CO	\$10.20M						0.50%		
Cold Bore Capital Fund III	2024	Buyout	Chicago, IL	\$22.50M								
Commerce Street Private Equity Fund I	2024	Buyout	New York, NY	\$7.20M								
Community Fuel Investment Partners VI		Growth/Expansion	New York, NY	\$3.78M								
Community Housing Investment Partners II	2024	Buyout	Saratoga Springs, NY	\$91.18M								
Conant Capital Partners I	2024	Growth/Expansion	Concord, MA	\$4.25M								
Concord Innovation Fund III	2024	Growth/Expansion	Summit, NJ	\$47.84M								
Concurrent Private Equity Opportunities Fund I	2024	Buyout	Indianapolis, IN	\$30.33M								
Conifer Biomethanol Fund	2024	Buyout	Houston, TX	\$20.50M								
Conquer CH DIF III	2024	Buyout	Oklahoma City, OK	\$15.09M								
Cordillera Investment Fund IV	2024	Growth/Expansion	San Francisco, CA	\$205.89M								
CORE Industrial Services Fund I	2024	Growth/Expansion	Chicago, IL	\$202.00M								
Corridor Capital IV	2024	Buyout	Los Angeles, CA	\$95.35M								
Corrum Capital Cargo Opportunities II	2024	Buyout	Charlotte, NC	\$66.19M								
Council Oaks Partners Fund I	2024	Buyout	Austin, TX	\$39.00M								
Covalence Equity Income Fund	2024	Buyout	Houston, TX	\$62.49M								
CPC TDR Special Opportunities Fund I	2024	Buyout	Dallas, TX	\$16.67M						0.75%		

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
CPICS ICAT Investment Fund	2024	Buyout	New York, NY	\$1.56M								
CPS Partners Fund V	2024	Buyout	Toronto, Canada	\$50.01M								
CWI Fund V	2024	Buyout	Cleveland, OH	\$26.67M								
CYWP Solar Energy I	2024	Buyout	Potomac, MD	\$25.38M								
Daymark Fund I		Buyout	New York, NY	\$6.25M								
DB Aviator Manager Selling	2024	Buyout	Boca Raton, FL	\$188.26M								
DCM Bain Capital Private Credit Fund		Buyout	Coral Gables, FL	\$67.71M								
DCM Cove HP III Fund	2024	Buyout	Coral Gables, FL	\$3.60M								
DCM HG Capital VII Fund	2024	Buyout	Coral Gables, FL	\$13.48M								
DCM NMP VII Fund	2024	Buyout	Coral Gables, FL	\$13.61M								
DC Small Business Fund	2024	Buyout	Jacksonville Beach, FL	\$200.00M								
DC Super Interior	2024	Buyout	Jacksonville Beach, FL	\$208.78K								
Define Capital Fund	2024	Buyout	Toronto, Canada	\$14.47M								
Delta-v Capital Fund V	2024	Growth/Expansion	Denver, CO	\$73.55M								
Delta-v VN	2024	Buyout	Denver, CO	\$57.00M								
Developed Markets Mid Cap Seed Portfolio	2024	Buyout	San Francisco, CA	\$1.11M								
DIMA Courtside Fund	2024	Buyout	Pittsburgh, PA	\$2.75M								
DIMA GP Insight Fund	2024	Buyout	Pittsburgh, PA	\$30.38M								
Dima TEF II		Buyout	Pittsburgh, PA	\$20.63M								
Divergent Investments Fund	2024	Buyout	San Carlos, CA	\$56.12M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Doliver Private Income Fund I	2024	Buyout	Houston, TX	\$58.00K								
Doliver Private Opportunity Fund II	2024	Buyout	Houston, TX	\$19.18K								
DPRR Fund I	2024	Buyout	New York, NY	\$74.00M								
Dundee Harmony	2024	Buyout	Toronto, Canada	\$51.90M								
Dundee Melody	2024	Buyout	Toronto, Canada	\$40.00M								
DVPI Direct Opportunities	2024	Buyout	Chicago, IL	\$18.13M								
Dynasty Equity Fund	2024	Buyout	New York, NY	\$22.80M								
Ecofin Direct Social Impact Fund IV	2024	Buyout	Overland Park, KS	\$60.99M								
EGCP Investment Partner I	2024	Growth/Expansion	Chicago, IL	\$200.00M								
EIV Resources II	2024	Buyout	Houston, TX	\$36.50M								
Emergent Strategic Capital I	2024	Buyout	Los Angeles, CA	\$2.93M								
Emergent Strategic Capital II	2024	Buyout	Los Angeles, CA	\$50.50M								
Emergent Strategic Capital IV	2024	Buyout	Los Angeles, CA	\$2.30M								
Empros Technologies Fund XIX	2024	Buyout	San Francisco, CA	\$46.89M								
Empros Technologies Fund XXXI	2024	Buyout	San Francisco, CA	\$2.59M								
Empros Technologies Fund XXXII	2024	Buyout	San Francisco, CA	\$10.59M								
Empros Technologies Fund XXXIII	2024	Buyout	San Francisco, CA	\$33.28M								
Enchanted Eagle Investments	2024	Buyout	Fort Worth, TX	\$10.03M								
Endicott Capital II	2024	Buyout	New York, NY	\$243.26M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Enventure Equity Fund 1	2024	Buyout	Naperville, IL	\$100.00M								
Envest Capital Partners III	2024	Buyout	Virginia Beach, VA	\$19.98M								
EPPN	2024	Growth/Expansion	Austin, TX	\$7.00M								
Equity Alliance Fund II	2024	Buyout	New York, NY	\$24.38M								
Estancia Capital Partners Fund III	2024	Buyout	Scottsdale, AZ	\$180.32M		0.97x	0.00x	0.97x				
Ethicaledge Digital Fund	2024	Buyout	Lake Mary, FL	\$500.00K								
Evergen Equity 14	2024	Buyout	Austin, TX	\$25.73M								
Evergen Equity 16	2024	Buyout	Austin, TX	\$7.10M								
Evergen Equity 17	2024	Buyout	Austin, TX	\$2.26M								
Evergen Equity 18	2024	Buyout	Austin, TX	\$5.25M								
Evergen Equity 19	2024	Buyout	Austin, TX	\$10.56M								
Evergen Equity 20	2024	Buyout	Austin, TX	\$1.50M								
Evergen Equity 21	2024	Buyout	Austin, TX	\$2.93M								
Evergen Equity 23	2024	Buyout	Austin, TX	\$4.47M								
Evergen Equity 24	2024	Buyout	Austin, TX	\$5.92M								
Evergen Equity 25	2024	Buyout	Austin, TX	\$12.65M								
Evergen Equity 26	2024	Buyout	Austin, TX	\$11.79M								
EW Sandy Commerce	2024	Buyout	Phoenix, AZ	\$1.30M								
Exeter Partnership 2024	2024	Buyout	Indianapolis, IN	\$119.59M								
Farol Fund III	2024	Buyout	New York, NY	\$37.09M		1.15x	0.01x	1.14x				
FDC Investment Partners VIII		Buyout	Waltham, MA	\$33.60M								
Forest Light Capital Fund	2024	Buyout	Fairfax, VA	\$500.00K								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
FortyTwo Investment Partners Fund	2024	Buyout	McKinney, TX	\$1.40M								
Fruition Capital Fund I	2024	Buyout	Atlanta, GA	\$4.86M								
Fruition Capital Fund II	2024	Buyout	Atlanta, GA	\$20.00M						2.00%	20.00%	
FVP Growth Partners	2024	Buyout	San Mateo, CA	\$11.58M								
FWG Capital Fund	2024	Buyout	Orlando, FL	\$10.95M								
FW Tessera	2024	Buyout	Kansas City, MO	\$2.63M								
FW Tessera Horizon	2024	Buyout	Kansas City, MO	\$15.65M								
Garden City Investors	2024	Buyout	Jupiter, FL	\$236.94M								
Gatsby Ventures	2024	Buyout	Mountain View, CA	\$40.78M								
GCP Strategic Opportunities II	2024	Buyout	Chicago, IL	\$120.14M								
GEC Partners V	2024	Growth/Expansion	Houston, TX	\$26.55M								
GEF UCO Partners Fund	2024	Buyout	Arlington, VA	\$19.58M								
Geller Multi-Vintage IV	2024	Buyout	New York, NY	\$117.56M								
GenNx360 Gear Fund	2024	Buyout	New York, NY	\$76.60M								
GGG I	2024	Buyout	New York, NY	\$35.00M								
GKB Growth Equity Fund II	2024	Growth/Expansion	Kansas City, MO	\$124.20M								
Glenmede Private Equity Fund 2024	2024	Buyout	Philadelphia, PA	\$71.33M								
Global Fund for Coral Reefs Investment Fund	2024	Buyout	Stamford, CT	\$175.00M								
GPSP Opportunity Fund	2024	Buyout	New York, NY	\$75.29M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
GQG Private Capital Solutions Fund Intermediary I	2024	Buyout	Fort Lauderdale, FL	\$31.75M								
GQG Private Capital Solutions Master Fund	2024	Buyout	Fort Lauderdale, FL	\$185.60M								
Gramercy PG Fund		Buyout	Greenwich, CT	\$3.36M								
Grant Avenue Capital Fund II	2024	Buyout	New York, NY	\$192.27M								
Gravity Special Fund V	2024	Buyout	New York, NY	\$1.51M								
Grays Creek Special Opportunities	2024	Buyout	Westport, CT	\$2.00M								
Greene Street Funding III	2024	Buyout	New York, NY	\$50.00M								
GT Private Equity XI	2024	Buyout	Memphis, TN	\$179.82M								
Guardian Halo Continuation Fund	2024	Buyout	Wayne, PA	\$197.90M								
Gulfstream PE II - Horizon Roofing Fund	2024	Buyout	Knoxville, TN	\$1.01M								
Gulfstream PJV	2024	Buyout	Knoxville, TN	\$850.00K								
Hadley Capital Fund IV	2024	Buyout	Wilmette, IL	\$50.00M								
Hale Capital Partners Fund V	2024	Buyout	New York, NY	\$48.23M								
Hamilton Lane Impact Fund III	2024	Diversified Private Equity	Conshohocken, PA	\$114.51M			0.00x		100.00%			
Harkness Capital Partners II	2024	Buyout	New York, NY	\$50.54M								
HCP Alaska	2024	Buyout	Fort Worth, TX	\$59.96M								
HCP Services Fund	2024	Buyout	Detroit, MI	\$89.65M								
Health Catalyst Capital Annex Fund II	2024	Growth/Expansion	New York, NY	\$4.00M								
Heritage Holding Fund I	2024	Buyout	Boston, MA	\$220.00M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Hesperia Advanced	2024	Growth/Expansion	Boston, MA	\$1.50M								
High Flying Foods Fund I	2024	Buyout	Sausalito, CA	\$5.10M								
Highland Rim Capital Partners	2024	Buyout	Nashville, TN	\$84.00M								
High Street Capital VI SBIC	2024	Buyout	Chicago, IL	\$247.50M								
Hilltop Growth AI Fund VI	2024	Buyout	Houston, TX	\$800.00K								
Hilltop Growth Fund VI	2024	Buyout	Houston, TX	\$63.90M								
Hors d'Age I	2024	Buyout	Boulder, CO	\$655.36K								
Horton Opportunity Fund 2	2024	Buyout	Philadelphia, PA	\$9.76M								
Hostplus Go V	2024	Buyout	New York, NY	\$103.09M								
HSFP Fund	2024	Buyout	Memphis, TN	\$21.55M								
HS Mohawk Fund I	2024	Buyout	Stamford, CT	\$175.00M								
IFG Preferred Equity Fund	2024	Buyout	Great Neck, NY	\$6.07M								
IMB Partners SBIC I	2024	Buyout	Bethesda, MD	\$125.50M								
IMCO Private Equity Pool Fund	2024	Growth/Expansion	Toronto, Canada	\$5.22M								
Indago Asset-Based Opportunities I	2024	Buyout	New York, NY	\$55.00M								
Industrial & Aerospace Buyout 2022	2024	Buyout	Atlanta, GA	\$13.45M								
InnovaHealth Partners Fund II	2024	Growth/Expansion	New York, NY	\$37.45M								
Innovate Capital Growth Fund	2024	Growth/Expansion	Philadelphia, PA	\$16.77M								
INP JC Ingenuity Opportunistic Fund	2024	Growth/Expansion	Vancouver, Canada	\$3.22M						2.00%	20.00%	

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Integrity Growth Partners Fund II	2024	Growth/Expansion	Los Angeles, CA	\$200.00M								
Interchange Capital Partners Onramp Fund		Buyout	New York, NY	\$5.60M								
InvestEco Sustainable Food Fund IV	2024	Growth/Expansion	Toronto, Canada	\$182.00K								
JHCP Spicewood II	2024	Buyout	Tulsa, OK	\$9.55M								
JPAS - Impact 2024	2024	Buyout	San Francisco, CA	\$73.01M								
JPAS - Private Assets 2024	2024	Buyout	San Francisco, CA	\$96.87M								
JTS Capital Fund IV	2024	Buyout	Waco, TX	\$50.10M								
K2 Capital a16z Fund	2024	Buyout	Dowagiac, MI	\$4.35M								
KCP Enduring Value I	2024	Buyout	Charlotte, NC	\$224.20M								
Kenosha Municipal Opportunities Fund IV	2024	Buyout	Boulder, CO	\$29.69M								
Kian Capital Fund	2024	Growth/Expansion	Charlotte, NC	\$230.00M								
Kiron Integrity Notes Fund	2024	Buyout	Plano, TX	\$20.00M								
KM Growth Fund I	2024	Growth/Expansion	New York, NY	\$27.00M								
L2 Point CDV Overflow I	2024	Growth/Expansion	San Francisco, CA	\$43.22M								
Landmark Private Opportunities (Fg) 2021	2024	Buyout	Simsbury, CT	\$77.80M								
L Catterton Vintage Fund	2024	Buyout	Greenwich, CT	\$27.57M								
Leargas Fund III	2024	Buyout	Westport, CT	\$110.90M								
Lenora Capital MultiStrategy Fund I	2024	Buyout	Seattle, WA	\$84.13M								
Lewis & Clark Agrifood BN-1	2024	Growth/Expansion	Saint Louis, MO	\$1.40M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Liftbridge ERISA Fund	2024	Buyout	Stillwater, MN	\$150.00M								
Lime Rock New Energy II	2024	Growth/Expansion	Westport, CT	\$12.00M			0.00x		100.00%			
Lincolnshire Equity Fund VI	2024	Buyout	New York, NY	\$53.52M								
LongueVue Capital Partners Sidecar I	2024	Growth/Expansion	New Orleans, LA	\$94.00M	+44.55%	1.30x	0.00x	1.30x	80.35%			1 (Top)
LS 2024 - Allocate Fund	2024	Buyout	Menlo Park, CA	\$17.11M								
Mach33 Special Fund II	2024	Buyout	Indian Harbour Beach, FL	\$3.30M								
MAI Capital Income & Growth Fund VI	2024	Growth/Expansion	Cleveland, OH	\$183.68M								
Marblegate Partners III Overflow Master Fund	2024	Buyout	Greenwich, CT	\$1.16M								
Maroon Peaks Private Equity Fund XIII	2024	Buyout	Boulder, CO	\$32.31M								
MCM Capital Partners IV	2024	Buyout	Beachwood, OH	\$135.00M								
MCP Strategic Capital I	2024	Buyout	Atlanta, GA	\$4.00M								
Mereo Capital Partners II	2024	Buyout	Conshohocken, PA	\$26.43M								
MHC Investments III	2024	Buyout	Prairie Village, KS	\$28.70M								
MKB Partners Fund III	2024	Growth/Expansion	Montreal, Canada	\$158.00M								
Monaco Capital Fund	2024	Buyout	Parkville, MO	\$160.00K								
Monmouth Shores Equity	2024	Buyout		\$125.00M								
Morgan Creek Digital Fund IV	2024	Buyout	Chapel Hill, NC	\$52.00M								
MP Investment Club PE Growth Fund 4	2024	Growth/Expansion	New York, NY	\$4.82M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
MRWM Opportunity Fund II	2024	Buyout	Nashville, TN	\$8.55M								
Natural Capital Fund II	2024	Growth/Expansion	Little Rock, AR	\$98.71M						2.00%	20.00%	
Natural Capital Fund IIA	2024	Growth/Expansion	Little Rock, AR	\$14.54M								
Neighborhood Capital Partners Fund	2024	Buyout	New York, NY	\$20.00M								
Newport Des Moines	2024	Buyout	Dallas, TX	\$2.50M								
Newport Texarkana	2024	Buyout	Dallas, TX	\$5.05M								
Newvale Capital Fund I	2024	Growth/Expansion	Boulder, CO	\$167.00M								
NewVest Investors	2024	Buyout	New York, NY	\$4.46M								
NewVest PE50 2023	2024	Buyout	New York, NY	\$140.00M								
NewVest PE50 2024	2024	Buyout	New York, NY	\$180.00M								
NextGen Growth Partners Fund III	2024	Buyout	Chicago, IL	\$165.00M								
Nexus Capital Fund I	2024	Buyout	Clearwater, FL	\$5.32M								
NFP Rollover Partners	2024	Buyout	Atlanta, GA	\$11.01M								
NMC Fund I	2024	Buyout	Providence, RI	\$50.00M								
Noble Advisors	2024	Diversified Private Equity	Lancaster, PA	\$20.00M								
Norlantic Fund I	2024	Buyout	New York, NY	\$50.00M								
Northleaf Growth Fund	2024	Growth/Expansion	Toronto, Canada	\$212.00M								
NRC Private Equity Opportunities III	2024	Buyout	Charlotte, NC	\$72.96M								
Nuveen Climate Inclusion Fund II	2024	Buyout	Chicago, IL	\$227.48M								
NYC CLF	2024	Buyout	New York, NY	\$9.40M						1.50%	20.00%	

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Oak Proof Fund I	2024	Buyout	Louisville, KY	\$2.25M								
OCA Apollo X	2024	Buyout	New York, NY	\$43.68M								
OCA EQ Fund	2024	Buyout	New York, NY	\$53.36M								
OCA L Catteron X	2024	Buyout	New York, NY	\$40.41M								
OCA TA XV	2024	Buyout	New York, NY	\$28.21M								
OCM Private Wealth Whiskey Opportunity I	2024	Buyout	Cleveland, OH	\$9.61M								
OFS Private Markets Fund I	2024	Buyout	New York, NY	\$12.20M								
Ohio Life Sciences Fund	2024	Growth/Expansion	Cleveland, OH	\$10.00M								
Old Hickory Partners Fund II	2024	Buyout	Austin, TX	\$156.98M								
OLYSC1	2024	Buyout	Stamford, CT	\$50.00M								
Omaha Heritage 2024	2024	Buyout	Omaha, NE	\$10.75M								
Omega Capital Fund II	2024	Buyout	Tulsa, OK	\$20.00M								
One Brick Select Private Equity 2024	2024	Buyout	Conshohocken, PA	\$24.55M								
One Madison Carbone III	2024	Buyout	New York, NY	\$7.50M								
Open Prairie Rural Opportunities Fund II	2024	Buyout	Effingham, IL	\$21.60M								
Operose Capital Private Equity I	2024	Buyout	Milwaukee, WI	\$44.46M								
Opportunity Dallas Fund Founders Ed	2024	Buyout	Dallas, TX	\$750.00K								
Optimal Health Advocates Fund	2024	Buyout	Traverse City, MI	\$5.05M								
Optimal MCAP Fund II	2024	Buyout	Traverse City, MI	\$11.35M								
Opus I	2024	Buyout	Birmingham, AL	\$17.50M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Opus Private Equity Opportunity Fund	2024	Buyout	New York, NY	\$23.25M								
OTV Allocate	2024	Buyout	Menlo Park, CA	\$5.00M								
Pacenote Equity Fund I	2024	Buyout	Austin, TX	\$87.58M								
Pactolus Devoted Fund	2024	Buyout	Vienna, VA	\$9.23M								
Painted Rock Investment Partners II	2024	Buyout	Brockton, MA	\$16.26M								
Parallaxes Capital Opportunity Fund VI	2024	Buyout	New York, NY	\$156.40M								
Pathfinder 360 Capital Pool II	2024	Buyout	Minnetonka, MN	\$142.98M								
PECS Overflow Fund	2024	Buyout	Boston, MA	\$135.00M								
PEP SailingStone Ludlow	2024	Buyout	Houston, TX	\$10.00M								
PIMCO Blue Point Fund	2024	Buyout	Newport Beach, CA	\$25.00M								
PIMCO Firecrest Opportunities Fund	2024	Buyout	Newport Beach, CA	\$200.00M								
Predicate BeverageStrategies II	2024	Buyout	Scottsdale, AZ	\$4.88M						0.50%		
Primrose Equity Partners Fund I	2024	Buyout	Dallas, TX	\$12.50M								
Pritzker PAS Fund	2024	Buyout	Chicago, IL	\$247.50M								
Private AI Investments	2024	Buyout	Mountain View, CA	\$7.71M								
Private Technology Investments Fund	2024	Buyout	Mountain View, CA	\$43.07M								
Private Technology Investments II	2024	Buyout	Mountain View, CA	\$8.40M								
Project Bloom	2024	Buyout	Clayton, MO	\$60.00M								
Prospect Partners V	2024	Buyout	Chicago, IL	\$225.00M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Proterra Rural Growth Fund	2024	Growth/Expansion	Minneapolis, MN	\$34.00M								
Proteus Enterprises PPG	2024	Buyout	Potomac, MD	\$6.03M								
Proteus Private Equity Fund II	2024	Buyout	Indianapolis, IN	\$7.29M								
Proteus Private Equity Fund III	2024	Buyout	Indianapolis, IN	\$9.74M								
Prysm Capital Fund II	2024	Growth/Expansion	Princeton, NJ	\$220.10M		1.66x	0.00x	1.66x	53.26%			
PSP VI Project Cloud Investment	2024	Buyout	New York, NY	\$245.00M								
PVC Special Opportunities Fund I	2024	Buyout	Greenwich, CT	\$75.35M								
Radiant Health Partners	2024	Buyout	La Jolla, CA	\$14.98M								
Ragnar Defense Tech	2024	Buyout	Mountain View, CA	\$7.00M								
RC Harvest Roaring Fork	2024	Buyout	Irving, TX	\$5.18M								
REDC Fund	2024	Buyout	San Juan, PR	\$7.47M								
Red Door ICW Fund	2024	Buyout	Memphis, TN	\$31.04M								
Regenerative Capital Group Fund 1	2024	Buyout	Campbell River, Canada	\$36.58M								
Regent Street Partners Fund 2024	2024	Buyout	Indianapolis, IN	\$4.15M								
Regent Street Partners Fund 2025	2024	Buyout	Indianapolis, IN	\$11.75M								
Resolute Communities Fund V	2024	Buyout	Novato, CA	\$23.96M								
Revitate Consumer Growth Fund	2024	Growth/Expansion	Newport Beach, CA	\$100.00M								
Reynolda Equity Partners V	2024	Buyout	Winston-Salem, NC	\$61.52M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Rio Sierras Fund	2024	Buyout	Dallas, TX	\$45.00M								
Ritz PGA	2024	Buyout	Fort Lauderdale, FL	\$16.40M								
River Sea PSCP Roofing Investor	2024	Buyout	Boston, MA	\$5.71M								
Robco Partners XI	2024	Buyout	New York, NY	\$81.00M								
Rockefeller FinTech Innovation Fund I	2024	Buyout	New York, NY	\$60.40M								
Rock Island Capital Fund IV	2024	Buyout	Oak Brook, IL	\$240.00M		1.00x	0.00x	1.00x	81.67%			
Roligo Dental Fund	2024	Buyout	Closter, NJ	\$5.60M								
Route Two Partners	2024	Buyout	New York, NY	\$17.33M								
RZ Aerospace Investments	2024	Buyout	Mountain View, CA	\$6.86M								
Sandlot Partners Private Equity 2022	2024	Buyout	Orem, UT	\$8.85M								
Sara Capital Partners PD	2024	Buyout	Madison, WI	\$4.83M								
Savory Fund III	2024	Buyout	Lehi, UT	\$70.00M								
Sciens Water Opportunities Fund IV Segregated	2024	Buyout	New York, NY	\$37.96M								
SCP Newton Investors	2024	Buyout	Chicago, IL	\$12.00M								
SCP Shield	2024	Buyout	New York, NY	\$15.00M								
SDC BOLT-A	2024	Buyout	New York, NY	\$132.20M								
Search Fund Partners 9	2024	Buyout	Menlo Park, CA	\$47.00M								
Seaward Partners 1	2024	Buyout	Mississauga, Canada	\$6.41M						2.00%		
Seeding PE Fund I		Buyout	New York, NY	\$200.40M								
Semillero Investment Fund II	2024	Growth/Expansion	San Juan, PR	\$29.63M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
SEP Diamond Fund	2024	Buyout	Los Angeles, CA	\$120.00M	+8.90%	1.09x	0.00x	1.09x	10.40%			2 (Upper-Mid)
SEP River Valley	2024	Buyout	Houston, TX	\$5.16M								
Seva I	2024	Growth/Expansion	Brooklyn, NY	\$85.00M								
Seven Hills Capital Fund I	2024	Buyout	Nashville, TN	\$125.00M								
Shelby Companies	2024	Buyout	New York, NY	\$16.03M								
Shelter Interchange	2024	Buyout	Rye, NY	\$25.00M								
Shem Creek Capital Fund VII	2024	Buyout	Wellesley, MA	\$31.30M								
Shorehaven Arcturus Fund I	2024	Buyout	New York, NY	\$5.63M								
Shorepoint Income Fund II	2024	Buyout	Norwood, MA	\$13.40M								
Signal Hill Equity Partners IV	2024	Buyout	Toronto, Canada	\$200.00M								
Signet Healthcare Partners V	2024	Growth/Expansion	New York, NY	\$191.10M								
Sixth Street TAO AC Partners	2024	Buyout	San Francisco, CA	\$18.10M								
Skyline Investors I	2024	Buyout	Los Angeles, CA	\$125.00M								
Sky Opportunity I	2024	Buyout	State College, PA	\$200.00K								
Smart Air & Energy Master Fund	2024	Buyout	Conshohocken, PA	\$106.50M								
Soleus Private Equity Fund III	2024	Buyout	Greenwich, CT	\$218.00M								
Southern Ontario Environmental Impact Fund	2024	Buyout	Guelph, Canada	\$5.20M								
Sovereign Fire Services	2024	Buyout	Atlanta, GA	\$49.94M								
Sovereign's Capital Lower Middle Market Fund II	2024	Buyout	Atlanta, GA	\$143.39M								
Starfield Front SLP	2024	Buyout	Atlanta, GA	\$1.80M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
St Community Housing Investment Partners I	2024	Buyout	Saratoga Springs, NY	\$66.29M								
StepStone VC 2022-CCT	2024	Buyout	New York, NY	\$50.70M								
StoneTree Investment Partners Fund I	2024	Buyout	Dallas, TX	\$155.00M								
STORY3 Consumer Opportunities Fund II	2024	Buyout	Los Angeles, CA	\$225.00M								
Strategic Equality Fund II	2024	Buyout	New York, NY	\$13.63M								
Strategic Value Private Investors II	2024	Buyout	Cleveland, OH	\$39.55M								
Stride Opportunities Fund	2024	Buyout	Westport, CT	\$7.01M								
SV7 Plus Growth Fund	2024	Growth/Expansion	Boston, MA	\$35.00M								
Sverica Continuation Fund I	2024	Buyout	Boston, MA	\$144.30M								
Swingsville Fund	2024	Buyout	New York, NY	\$7.55M								
Systematic AI Investments II	2024	Buyout	Mountain View, CA	\$11.67M								
TA Investors IV	2024	Buyout	Boston, MA	\$174.69M								
TC AH 2024 Annual Fund		Buyout	San Francisco, CA	\$183.34M								
TCWA Esperanza GoM	2024	Buyout	Dallas, TX	\$14.81M								
TCWA Turns	2024	Buyout	Dallas, TX	\$8.40M								
Teedup Investment Fund	2024	Growth/Expansion	Walnut Creek, CA	\$1.73M								
TFS Private Opportunities Fund	2024	Buyout	Abilene, TX	\$6.10M								
The Legacy Capital Private Equity Fund	2024	Buyout	West Jordan, UT	\$250.00K						2.00%		

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
The Living Cities Catalyst Fund III, Known	2024	Buyout	New York, NY	\$100.00M								
Third Lake PE Fund I	2024	Buyout	Tampa, FL	\$112.00M								
TigerMax Partners	2024	Buyout	New York, NY	\$125.00M			0.00x		100.00%			
Tilden Park CMBS Opportunity Fund	2024	Buyout	New York, NY	\$5.18M								
Titan Protein Fund	2024	Buyout	New York, NY	\$3.80M								
Titan Space Fund	2024	Buyout	New York, NY	\$97.78M								
Titan Thera Fund	2024	Buyout	New York, NY	\$26.37M								
TKI Partners VI	2024	Buyout	Boulder, CO	\$8.50M								
Tolleson 2024 Alternative Income	2024	Buyout	Dallas, TX	\$94.48M								
Tomales Bay Capital Bluebird	2024	Buyout	Las Vegas, NV	\$31.70M								
Tomales Bay Capital GGF ZHR IX	2024	Growth/Expansion	Las Vegas, NV	\$2.80M								
TPE Boulder Fund 2024	2024	Buyout	Boulder, CO	\$10.90M								
TPG Growth Equity VI	2024	Growth/Expansion	San Francisco, CA	\$44.04M								
TPG Hybrid Solutions	2024	Buyout	New York, NY	\$155.00M								
TPG Ostrich Partners	2024	Buyout	San Francisco, CA	\$200.60M								
Trademark Partners Fund	2024	Buyout	Watkinsville, GA	\$500.00K								
Transcend Capital Reinsurance Fund III	2024	Buyout	Madison, NJ	\$40.45M								
Transform Capital Fund	2024	Buyout	Austin, TX	\$8.10M								
TRG NBS Fund	2024	Buyout	New York, NY	\$35.75M								
TRG PGE Fund	2024	Buyout	New York, NY	\$13.91M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
TRGP Opportunities Fund	2024	Buyout	Stamford, CT	\$61.63M								
Trinity BVG Jaya Investors	2024	Buyout	Southlake, TX	\$17.70M								
Trinity S2 MF Fund II	2024	Buyout	Southlake, TX	\$29.57M								
Trinity Structured Equity Fund I	2024	Buyout	Southlake, TX	\$3.50M								
Triwest Capital Partners VI	2024	Buyout	Calgary, Canada	\$8.89M								
TRP Capital Partners VI	2024	Buyout	Birmingham, MI	\$236.41M								
TruWest Fund I	2024	Growth/Expansion	Westlake, OH	\$50.00M								
TTF Tech Pioneer	2024	Buyout	Mountain View, CA	\$9.63M								
Validus Private Equity Fund II	2024	Buyout	El Segundo, CA	\$25.03M								
Validus Strategic Equity Fund Plus	2024	Buyout	El Segundo, CA	\$15.20M								
Valor Summit 1.0 Fund		Growth/Expansion	Chicago, IL	\$10.00M								
Vanterra HPH III	2024	Growth/Expansion	New York, NY	\$51.50M								
Vesper Podcasting Investments	2024	Buyout	New York, NY	\$250.00K								
Vesper Principal Capital	2024	Buyout	New York, NY	\$4.22M								
Vesper Sports Bridge	2024	Buyout	New York, NY	\$560.00K								
Vesper Sports Roll	2024	Buyout	New York, NY	\$725.00K								
Vesper Tiger	2024	Buyout	New York, NY	\$33.31M								
Vested 2023 Summer Opportunity Fund	2024	Buyout	Weston, FL	\$7.15M								
Vested 2024 Summer Opportunity Fund	2024	Buyout	Weston, FL	\$5.66M								
VG 1.0	2024	Buyout	Chicago, IL	\$75.00M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
VIP Alpha Plus Fund I	2024	Buyout	Austin, TX	\$60.85M								
Virtera Energy Opportunity I		Buyout	Pepper Pike, OH	\$14.62M								
Vista Equity Endeavor Fund III	2024	Buyout	Austin, TX	\$12.25M								
Voyager Mack		Buyout	Dallas, TX	\$6.01M								
VP Owl Management	2024	Buyout	New York, NY	\$24.00M								
Warana Structured Solutions	2024	Buyout	New York, NY	\$2.26M								
Washington Harbour Cyber	2024	Buyout	Arlington, VA	\$115.11M								
Washington Harbour Digital Mission	2024	Buyout	Arlington, VA	\$71.57M								
Washington Harbour Kitchen	2024	Buyout	Arlington, VA	\$1.50M								
Washington Harbour Radar	2024	Buyout	Arlington, VA	\$7.06M								
Washington Harbour Triso Fund	2024	Buyout	Arlington, VA	\$2.83M								
Waterfall LaSalle Fund	2024	Buyout	New York, NY	\$150.00M								
WDC Genesis	2024	Diversified Private Equity	Bakersfield, CA	\$25.00M								
Westerman Capital	2024	Buyout	New York, NY	\$15.00M								
Westlake Capital Fund I	2024	Buyout	Austin, TX	\$50.00M								
West Monroe Capital Fund III	2024	Buyout	Chicago, IL	\$31.59M								
West Street Private Markets 2024	2024	Buyout	New York, NY	\$144.46M								
Westview PE Fund II		Buyout	Boston, MA	\$9.50M								
Wine Capital Investments Fund	2024	Diversified Private Equity	New York, NY	\$100.00M								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Wonder Mack		Buyout	Dallas, TX	\$72.00M								
W-Prime Entourage	2024	Buyout	New York, NY	\$165.00M								
WSC Search & Acquire Fund III	2024	Buyout	Charlotte, NC	\$35.15M								
WWC Cap Seacoast Investors	2024	Buyout	Miami, FL	\$10.10M								
WWCIP I Institutional	2024	Buyout	Miami, FL	\$27.95M								
XT Established Opportunities Fund	2024	Buyout	Houston, TX	\$50.00M								
YEH Capital SGP	2024	Buyout	Brea, CA	\$5.13M								
Zone 2 Partners	2024	Buyout	Menlo Park, CA	\$8.91M								
ZX XX	2024	Buyout	Mountain View, CA	\$1.86M								

Fund # 26: Hellman & Friedman Capital Partners XI

General Information

Fund Manager	Hellman & Friedman	Fund Status	Closed
Access Point	Primary Fund	Fund Lifespan	Finite-Life
Fund Category	Private Equity	Fund Family	Hellman & Friedman Capital Partners
Fund Structure	Drawdown	Fund Native Currency	USD
Exchange Status	Non-Listed	Open Date	13-Dec-2022
Fund Type	Buyout	Close Date	14-Jul-2023
Size	\$22.30B	SBIC	No
Vintage	2023	Targets Private Wealth	No
Domiciles	United States: Delaware, Cayman Islands	Investors Distribution	\$0.00 (as of 30-Jun-2025)

Performance Overview (As of 2Q2025)	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Hellman & Friedman Capital Partners XI	\$22.30B	-	-	0.00x	-	-	-	-	-
Benchmark (51 Funds)	\$2.62B (median)	+14.93%	1.06x	0.01x	1.03x	68.97%	1.63%	20.00%	-

Performance Overview (As of 2Q2025)	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Hellman & Friedman Capital Partners XI vs Benchmark	\$19.68B	-	-	-0.01x	-	-	-	-	-

Fund Close History

Close Date	Close Type	Comments
14-Jul-2023	Final Close	The fund held a final close at USD 22.3 billion on July 07, 2023

Additional Note:

Hellman & Friedman Capital Partners XI is a buyout fund managed by Hellman & Friedman. The fund is located in San Francisco, California.

Contact Information

Fund Managers

Hellman & Friedman

Fund Location

415 Mission Street

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San Francisco, CA 94105

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Fund Service Providers

Service Provider Name	Service Provided	Service To	Comments
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	
UBS Group	Placement Agent	Investor - Hellman & Friedman	

Limited Partners (38)

Limited Partner	Type	Status	Commitment	Date	Commitment Type	Comments
Alaska Permanent Fund	Sovereign Wealth Fund	Current	\$25.00M	14-Jul-2023	Original	

Limited Partner	Type	Status	Commitment	Date	Commitment Type	Comments
Alaska Retirement Management Board	Public Pension Fund	Current		14-Jul-2023	Original	
Bain Capital	Direct Investment	Current	\$150.00M	14-Jul-2023	Original	
British Columbia Investment Management	Money Management Firm	Current		14-Jul-2023	Original	
California State Teachers' Retirement System	Public Pension Fund	Current		14-Jul-2023	Original	
Contra Costa County Employees' Retirement Association	Public Pension Fund	Current	\$100.00M	14-Jul-2023	Original	
CPP Investments	Public Pension Fund	Current		14-Jul-2023	Original	
Employees' Retirement System of the State of Hawaii	Public Pension Fund	Current	\$50.00M	14-Jul-2023	Original	
Florida Retirement System Pension Plan	Public Pension Fund	Current		14-Jul-2023	Original	
Florida State Board of Administration	Public Pension Fund	Current	\$200.00M	14-Jul-2023	Original	
Government Pension Investment Fund of Japan	Public Pension Fund	Current		14-Jul-2023	Original	
Houston Firefighters' Relief and Retirement Fund	Public Pension Fund	Current	\$100.00M	14-Jul-2023	Original	
ICG Enterprise Trust	Fund of Funds	Current	\$10.00M	14-Jul-2023	Original	
Indiana Public Retirement System	Public Pension Fund	Current	\$150.00M	02-Mar-2023	Original	

Limited Partner	Type	Status	Commitment	Date	Commitment Type	Comments
Kentucky Teachers Medical Health Insurance Trust	Public Pension Fund	Current		14-Jul-2023	Original	
Kentucky Teachers' Retirement System	Public Pension Fund	Current	\$50.00M	14-Jul-2023	Original	
Los Angeles City Employees' Retirement System	Public Pension Fund	Current	\$50.00M	14-Jul-2023	Original	
Maryland State Retirement and Pension System	Public Pension Fund	Current		14-Jul-2023	Original	
Massachusetts Pension Reserves Investment Trust	Public Pension Fund	Current	\$300.00M	14-Jul-2023	Original	
Minnesota State Board of Investment	Public Pension Fund	Current	\$100.00M	14-Jul-2023	Original	
Nevada Public Employees Retirement System	Public Pension Fund	Current		14-Jul-2023	Original	
New Mexico Public Employees' Retirement Association	Public Pension Fund	Current	\$75.00M	14-Jul-2023	Original	
New York State Common Retirement Fund	Public Pension Fund	Current	\$300.00M	14-Jul-2023	Original	
Ohio Public Employees Retirement System	Public Pension Fund	Current		14-Jul-2023	Original	
Orange County Employees' Retirement System	Public Pension Fund	Current		14-Jul-2023	Original	
Oregon Investment Council	Public Pension Fund	Current	\$250.00M	14-Jul-2023	Original	

Limited Partner	Type	Status	Commitment	Date	Commitment Type	Comments
Oregon Public Employees Retirement System	Public Pension Fund	Current		14-Jul-2023	Original	
Pennsylvania Public School Employees Retirement System	Public Pension Fund	Current	\$100.00M	14-Jul-2023	Original	
Pennsylvania State Employees' Retirement System	Public Pension Fund	Current		14-Jul-2023	Original	
San Francisco Employees' Retirement System	Public Pension Fund	Current	\$50.00M	14-Jul-2023	Original	
Santa Barbara County Employees Retirement System	Public Pension Fund	Current	\$10.00M	14-Jul-2023	Original	
State Teachers Retirement System of Ohio	Public Pension Fund	Current	\$50.00M	14-Jul-2023	Original	
Texas Permanent School Fund	Endowment	Current	\$75.00M	14-Jul-2023	Original	
The University of Texas/Texas A&M Investment Management Company	Endowment	Current	\$250.00M	14-Jul-2023	Original	
Ventura County Employees' Retirement Association	Public Pension Fund	Current		14-Jul-2023	Original	
Virginia Retirement System	Public Pension Fund	Current	\$300.00M	14-Jul-2023	Original	
Washington State Investment Board	Public Pension Fund	Current	\$750.00M	14-Jul-2023	Original	
Zurich North America	Insurance Company	Current		14-Jul-2023	Original	
Investment Preferences						

Preferred Deal Type

Buyout/LBO

Other Investment Preference


Prefers majority stake

Fund Returns History

Period	Contribution (by all LPs)	Dry Powder	Distribution (to all LPs)	NAV	Total Fund Distr+NAV	IRR	DPI	RVPI	TVPI	Dry Powder %
2Q25			0.00				0.00x			
1Q25	0.00	22,300.00	0.00				0.00x			100.00%
4Q24	0.00	22,300.00	0.00				0.00x			100.00%
3Q24	0.00	22,300.00	0.00				0.00x			100.00%
2Q24	0.00	22,300.00	0.00				0.00x			100.00%
1Q24	0.00	22,300.00	0.00				0.00x			100.00%
4Q23	0.00	22,300.00	0.00				0.00x			100.00%
3Q23	0.00	22,300.00	0.00				0.00x			100.00%
2Q23	0.00	22,300.00	0.00				0.00x			100.00%
1Q23	0.00	22,300.00	0.00				0.00x			100.00%
4Q22	0.00	22,300.00	0.00				0.00x			100.00%
3Q22	0.00	22,300.00	0.00							100.00%

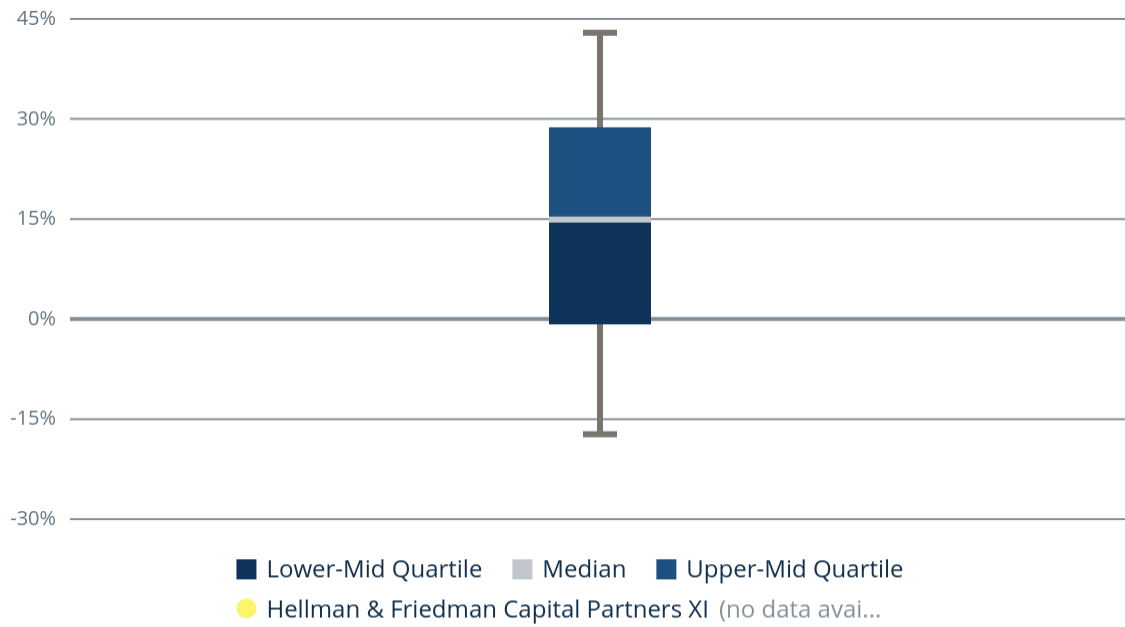
Benchmark

Methodology Data as of: 2025 Q2

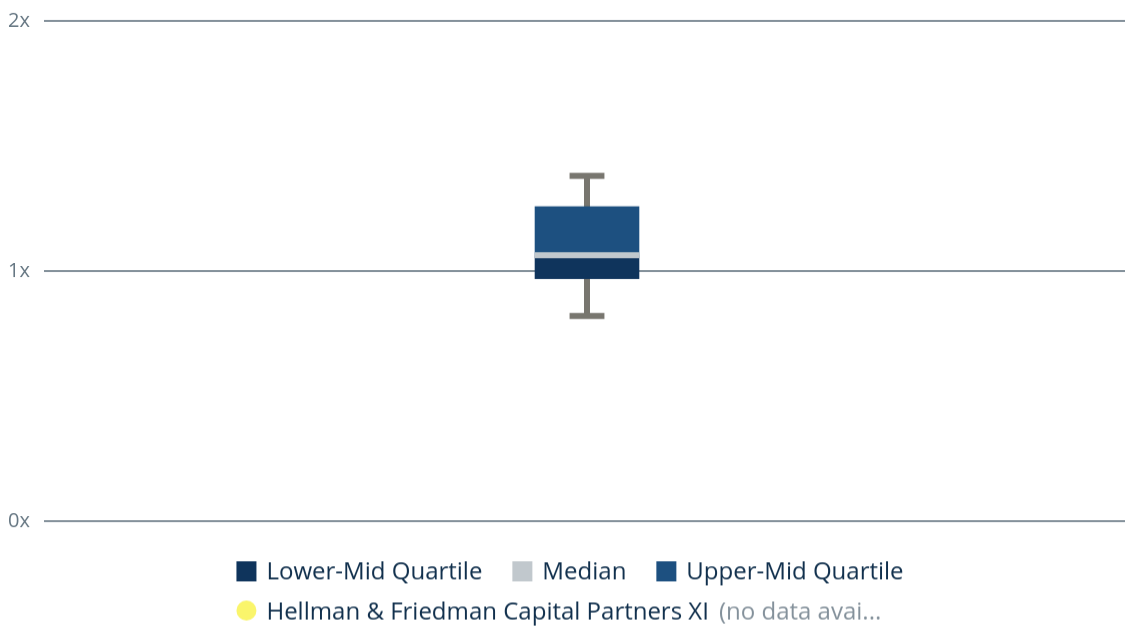
 **PitchBook Benchmark:** **Vintage:** 2023; **Access Point:** Primary Fund; **Fund Category:** Private Equity;
Fund Location: North America; **Fund Size:** \$1B+;

Performance Benchmark

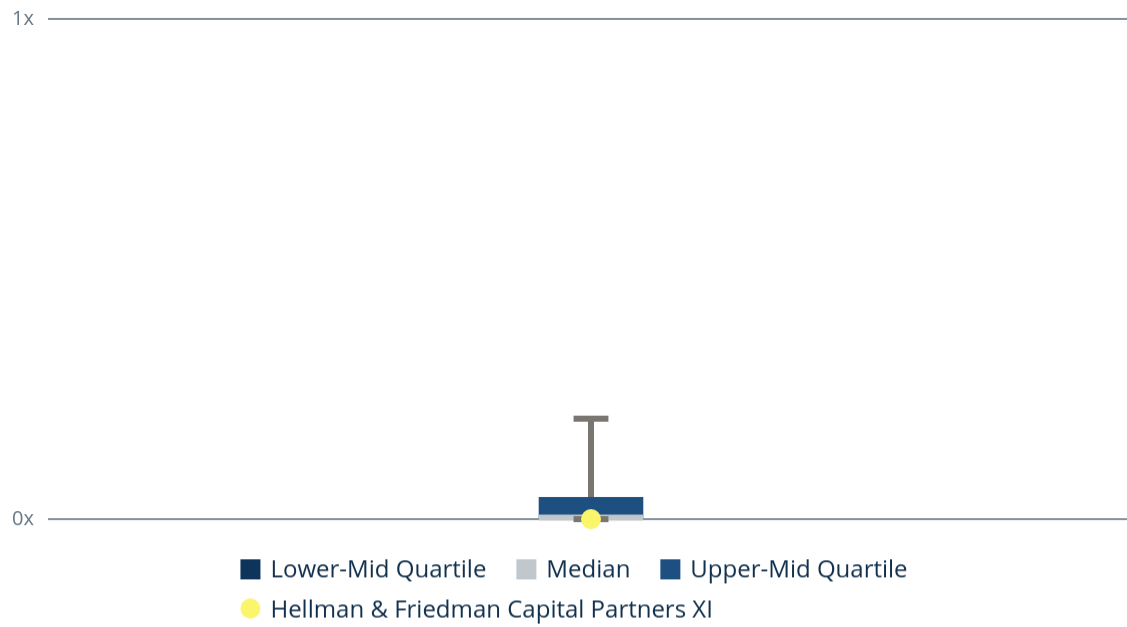
IRR



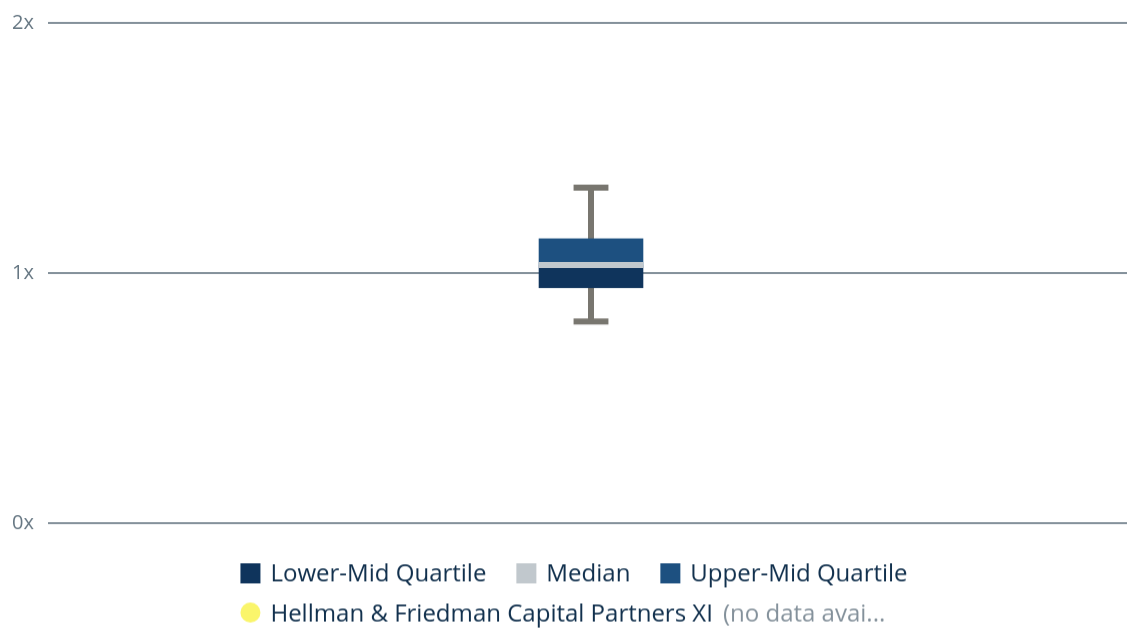
TVPI



DPI



RVPI



Benchmark Summary

14.93%	1.06x	0.01x	1.03x	68.97%
IRR	TVPI	DPI	RVPI	Dry Powder

Metric	Top Decile	Top Quartile	Median	Bottom Quartile	Bottom Decile	Total Funds
IRR	+42.93%	+28.75%	+14.93%	-0.80%	-17.29%	37
TVPI	1.38x	1.26x	1.06x	0.97x	0.82x	46
DPI	0.20x	0.04x	0.01x	0.00x	0.00x	48
RVPI	1.34x	1.14x	1.03x	0.94x	0.81x	45

Peer Group

Constituent Funds (51)

Funds that meet all of the benchmark criteria (i.e. Vintage, Access Point, Fund Category, Fund Location and Fund Size) and PitchBook’s Benchmarking [Methodology](#)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Hellman & Friedman Capital Partners XI	2023	Buyout	San Francisco, CA	\$22.30B			0.00x					
Accel-KKR Capital Partners VII	2023	Buyout	Menlo Park, CA	\$4.40B		0.00x	0.00x	0.00x	98.60%			
AEA Investors Small Business Fund V	2023	Buyout	New York, NY	\$1.30B	+4.72%			1.03x				3 (Lower-Mid)
AE Industrial Partners Fund III	2023	Buyout	Boca Raton, FL	\$1.28B	+28.75%	1.38x	0.00x	1.38x	56.68%			1 (Top)
Alpine Investors Iceman Continuation Vehicle	2023	Buyout	San Francisco, CA	\$2.61B	+21.84%	1.27x	0.23x	1.04x				2 (Upper-Mid)
Alpine Investors IX	2023	Buyout	San Francisco, CA	\$4.50B	+7.30%	1.07x	0.00x	1.07x	70.14%			3 (Lower-Mid)
Amulet Capital Fund III	2023	Buyout	Greenwich, CT	\$1.20B	-0.80%	0.99x	0.01x	0.99x				3 (Lower-Mid)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Apollo Investment Fund X	2023	Buyout	New York, NY	\$20.00B	+23.00%	1.36x	0.23x	1.12x	56.31%	1.50%	20.00%	2 (Upper-Mid)
Arcline Capital Partners III	2023	Buyout	Nashville, TN	\$4.50B	+35.10%	1.38x	0.00x	1.38x	18.03%			1 (Top)
Audax Private Equity Fund VII	2023	Buyout	Boston, MA	\$5.25B		1.06x	0.00x	1.06x				
Bain Capital Insurance Fund Private Investors	2023	Buyout	Boston, MA	\$1.15B	+105.30%	1.79x	0.08x	1.71x				1 (Top)
Cerberus Supply Chain Fund	2023	Buyout	New York, NY	\$1.60B	+37.83%	1.26x	0.01x	1.25x				1 (Top)
Charlesbank Technology Opportunities Fund II	2023	Buyout	Boston, MA	\$1.27B		0.97x	0.06x	0.91x				
Clearlake Capital Partners VIII	2023	Buyout	Santa Monica, CA	\$15.00B	-23.88%	0.80x	0.01x	0.80x	93.17%		20.00%	4 (Bottom)
Cortec Group Fund VIII	2023	Buyout	New York, NY	\$3.20B	-13.74%	0.93x	0.20x	0.73x				4 (Bottom)
EagleTree Partners VI	2023	Buyout	New York, NY	\$1.20B	+30.69%	1.26x	0.34x	0.92x	69.96%			1 (Top)
Flexpoint Fund V	2023	Buyout	Chicago, IL	\$2.02B		1.13x	0.13x	1.00x				
Francisco Partners Agility Fund III	2023	Buyout	San Francisco, CA	\$3.30B	+34.19%	1.02x	0.00x	1.02x	97.90%			1 (Top)
Gemspring Capital Fund III	2023	Buyout	Westport, CT	\$1.70B	-13.55%	1.00x						4 (Bottom)
Genstar Capital Partners XI	2023	Buyout	San Francisco, CA	\$12.60B	+6.71%	1.05x	0.08x	0.97x	86.74%			3 (Lower-Mid)
Graham Partners VI	2023	Buyout	Newtown Square, PA	\$1.84B	-9.11%	0.94x	0.01x	0.93x				4 (Bottom)
Green Equity Investors IX	2023	Buyout	Los Angeles, CA	\$15.20B	+19.22%	1.16x	0.03x	1.14x	45.81%	1.46%	20.00%	2 (Upper-Mid)
Haveli Investments Software Fund I	2023	Buyout	Austin, TX	\$4.50B		0.95x	0.00x	0.95x	57.75%			

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
H.I.G. Middle Market LBO Fund IV	2023	Buyout	Miami, FL	\$5.50B	-42.22%	0.77x	0.02x	0.75x	79.68%			4 (Bottom)
Incline Equity Partners VI	2023	Buyout	Pittsburgh, PA	\$1.90B			0.00x					
Insight Partners XIII Growth Buyout Fund	2023	Growth/Expansion	New York, NY	\$1.13B	+8.10%	1.04x	0.01x	1.04x				3 (Lower-Mid)
JMI Equity Fund XI	2023	Growth/Expansion	Baltimore, MD	\$2.40B	+13.71%	1.16x	0.00x	1.16x				3 (Lower-Mid)
Kohlberg Investors X	2023	Buyout	Mount Kisco, NY	\$4.30B	+21.56%	1.17x	0.00x	1.17x				2 (Upper-Mid)
KPS Special Situations Fund VI	2023	Buyout	New York, NY	\$8.00B	-2.28%	0.98x	0.02x	0.95x				4 (Bottom)
KPS Special Situations Mid-Cap Fund II	2023	Buyout	New York, NY	\$1.70B			0.00x					
Lee Equity Partners Fund IV	2023	Buyout	New York, NY	\$1.32B	-7.27%	0.94x	0.00x	0.94x				4 (Bottom)
LightBay Investment Partners II	2023	Buyout	Los Angeles, CA	\$1.04B	-37.93%	0.55x	0.01x	0.55x				4 (Bottom)
Lindsay Goldberg VI	2023	Buyout	New York, NY	\$4.04B			0.00x					
Lovell Minnick Equity Partners VI	2023	Buyout	Philadelphia, PA	\$1.10B		1.05x	0.01x	1.04x	77.93%			
LS Power Equity Partners V	2023	Buyout	New York, NY	\$2.70B	+71.85%	1.31x	0.17x	1.14x	51.23%			1 (Top)
New Mountain Partners VII	2023	Buyout	New York, NY	\$15.43B		0.98x	0.00x	0.98x		1.75%	20.00%	
Oaktree Power Opportunities Fund VI	2023	Buyout	Los Angeles, CA	\$2.00B	+27.00%	1.51x	0.41x	1.09x				2 (Upper-Mid)
Percheron Capital Fund II	2023	Buyout	San Francisco, CA	\$1.55B		0.91x	0.01x	0.91x	83.33%			
Platinum Equity Small Cap Fund II	2023	Buyout	Los Angeles, CA	\$2.28B	+59.82%	1.42x	0.01x	1.41x				1 (Top)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Quantum Capital Solutions II	2023	Buyout	Houston, TX	\$2.80B	+18.96%	1.35x	0.21x	1.15x				2 (Upper-Mid)
Searchlight Capital IV	2023	Buyout	New York, NY	\$2.62B	+1.92%	1.02x	0.00x	1.02x		1.85%	20.00%	3 (Lower-Mid)
Silver Lake Partners VII	2023	Buyout	Menlo Park, CA	\$20.50B	+14.65%	1.17x	0.01x	1.17x	67.98%			3 (Lower-Mid)
Silver Lake Strategic Investors VI	2023	Buyout	Menlo Park, CA	\$1.20B	+20.70%	1.41x	0.00x	1.41x				2 (Upper-Mid)
Sixth Street Growth Partners II	2023	Growth/Expansion	San Francisco, CA	\$3.60B	+9.77%	1.16x	0.04x	1.12x	56.42%	1.50%	20.00%	3 (Lower-Mid)
SkyKnight Capital Fund IV	2023	Buyout	San Francisco, CA	\$1.03B	+20.90%	1.14x	0.02x	1.12x				2 (Upper-Mid)
The Resolute Fund VI	2023	Buyout	New York, NY	\$6.90B	+50.58%	1.29x	0.00x	1.29x	59.91%	1.75%	20.00%	1 (Top)
TPG Growth Fund VI	2023	Growth/Expansion	San Francisco, CA	\$4.80B	+31.00%	1.10x						1 (Top)
Trive Capital Fund V	2023	Buyout	Dallas, TX	\$2.70B		0.81x	0.01x	0.81x	81.55%			
Vista Equity Partners Fund VIII	2023	Buyout	Austin, TX	\$20.00B	+14.93%	1.09x	0.07x	1.03x	39.01%			2 (Upper-Mid)
WestView Capital Partners V	2023	Buyout	Boston, MA	\$1.00B		0.97x	0.01x	0.97x				
Windjammer Capital Fund VI	2023	Buyout	Newport Beach, CA	\$1.30B	-22.60%	0.83x	0.00x	0.83x				4 (Bottom)

All Peers (87)

All Funds with and without requisite performance data that meet all of the benchmark criteria (i.e. Vintage, Access Point, Fund Category, Fund Location and Fund Size) regardless of PitchBook’s Benchmarking Methodology

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Hellman & Friedman Capital Partners XI	2023	Buyout	San Francisco, CA	\$22.30B			0.00x					

26N Private Equity Partners I	2023	Buyout	New York, NY	\$2.25B								
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Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Accel-KKR Capital Partners VII	2023	Buyout	Menlo Park, CA	\$4.40B		0.00x	0.00x	0.00x	98.60%			
AEA Investors Small Business Fund V	2023	Buyout	New York, NY	\$1.30B	+4.72%			1.03x				3 (Lower-Mid)
AE Industrial Partners Fund III	2023	Buyout	Boca Raton, FL	\$1.28B	+28.75%	1.38x	0.00x	1.38x	56.68%			1 (Top)
AG CSF2A Dislocation Fund		Buyout	New York, NY	\$686.20M								
Alpine Apex Service Partners Single Asset Continuation Fund	2023	Buyout	San Francisco, CA	\$3.40B								
Alpine Investors Iceman Continuation Vehicle	2023	Buyout	San Francisco, CA	\$2.61B	+21.84%	1.27x	0.23x	1.04x				2 (Upper-Mid)
Alpine Investors IX	2023	Buyout	San Francisco, CA	\$4.50B	+7.30%	1.07x	0.00x	1.07x	70.14%			3 (Lower-Mid)
Amulet Capital Fund III	2023	Buyout	Greenwich, CT	\$1.20B	-0.80%	0.99x	0.01x	0.99x				3 (Lower-Mid)
Apollo Investment Fund X	2023	Buyout	New York, NY	\$20.00B	+23.00%	1.36x	0.23x	1.12x	56.31%	1.50%	20.00%	2 (Upper-Mid)
Arcline Capital Partners III	2023	Buyout	Nashville, TN	\$4.50B	+35.10%	1.38x	0.00x	1.38x	18.03%			1 (Top)
Ares Corporate Opportunities Fund VII	2023	Buyout	Los Angeles, CA	\$2.80B								
Atairos Strategic Partners Fund	2023	Buyout	New York, NY	\$1.00B								
Audax Private Equity Fund VII	2023	Buyout	Boston, MA	\$5.25B		1.06x	0.00x	1.06x				
Aurora Equity Partners VII	2023	Buyout	Los Angeles, CA	\$2.10B								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Bain Capital Insurance Fund Private Investors	2023	Buyout	Boston, MA	\$1.15B	+105.30%	1.79x	0.08x	1.71x				1 (Top)
BDT Capital Partners Fund 4	2023	Buyout	Chicago, IL	\$14.00B								
Cerberus Supply Chain Fund	2023	Buyout	New York, NY	\$1.60B	+37.83%	1.26x	0.01x	1.25x				1 (Top)
Charlesbank Technology Opportunities Fund II	2023	Buyout	Boston, MA	\$1.27B		0.97x	0.06x	0.91x				
Clairvest Equity Partners VII	2023	Growth/Expansion	Toronto, Canada	\$1.20B								
Clearlake Capital Partners VIII	2023	Buyout	Santa Monica, CA	\$15.00B	-23.88%	0.80x	0.01x	0.80x	93.17%		20.00%	4 (Bottom)
Constellation Wealth Capital Fund I	2023	Growth/Expansion	Chicago, IL	\$1.01B								
Cortec Group Fund VIII	2023	Buyout	New York, NY	\$3.20B	-13.74%	0.93x	0.20x	0.73x				4 (Bottom)
Cressey & Co Fund VII	2023	Buyout	Chicago, IL	\$1.25B								
DFJ Growth V	2023	Growth/Expansion	Menlo Park, CA	\$1.20B								
EagleTree Partners VI	2023	Buyout	New York, NY	\$1.20B	+30.69%	1.26x	0.34x	0.92x	69.96%			1 (Top)
Flexpoint Fund V	2023	Buyout	Chicago, IL	\$2.02B		1.13x	0.13x	1.00x				
Francisco Partners Agility Fund III	2023	Buyout	San Francisco, CA	\$3.30B	+34.19%	1.02x	0.00x	1.02x	97.90%			1 (Top)
Gallatin Point Capital Partners II	2023	Buyout	Greenwich, CT	\$1.60B								
Gemspring Capital Fund III	2023	Buyout	Westport, CT	\$1.70B	-13.55%	1.00x						4 (Bottom)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
General Atlantic BnZ Companion Fund	2023	Growth/Expansion	New York, NY	\$3.50B								
General Atlantic Investment Partners 2023	2023	Growth/Expansion	New York, NY	\$2.45B								
Genstar Capital Partners XI	2023	Buyout	San Francisco, CA	\$12.60B	+6.71%	1.05x	0.08x	0.97x	86.74%			3 (Lower-Mid)
Glide Path Solutions 2023	2023	Buyout	San Francisco, CA	\$1.44B								
Graham Partners VI	2023	Buyout	Newtown Square, PA	\$1.84B	-9.11%	0.94x	0.01x	0.93x				4 (Bottom)
Greenbelt Capital Partners III	2023	Buyout	Austin, TX	\$1.00B								
Green Equity Investors CF III	2023	Buyout	Los Angeles, CA	\$2.17B								
Green Equity Investors Continuation Fund	2023	Buyout	Los Angeles, CA	\$2.20B								
Green Equity Investors IX	2023	Buyout	Los Angeles, CA	\$15.20B	+19.22%	1.16x	0.03x	1.14x	45.81%	1.46%	20.00%	2 (Upper-Mid)
Haveli Investments Software Fund I	2023	Buyout	Austin, TX	\$4.50B		0.95x	0.00x	0.95x	57.75%			
H.I.G. Middle Market LBO Fund IV	2023	Buyout	Miami, FL	\$5.50B	-42.22%	0.77x	0.02x	0.75x	79.68%			4 (Bottom)
Horizon Environment & Climate Solutions I	2023	Growth/Expansion	New York, NY	\$1.60B								
Incline Equity Partners VI	2023	Buyout	Pittsburgh, PA	\$1.90B			0.00x					
Insight Partners Continuation Fund II	2023	Buyout	New York, NY	\$1.30B								

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Insight Partners XIII Growth Buyout Fund	2023	Growth/Expansion	New York, NY	\$1.13B	+8.10%	1.04x	0.01x	1.04x				3 (Lower-Mid)
JMI Equity Fund XI	2023	Growth/Expansion	Baltimore, MD	\$2.40B	+13.71%	1.16x	0.00x	1.16x				3 (Lower-Mid)
Kainos Capital Partners III	2023	Buyout	Dallas, TX	\$1.00B								
Kinderhook Continuation Fund	2023	Buyout	New York, NY	\$1.30B								
KKR Private Equity Conglomerate	2023	Buyout	New York, NY	\$2.61B								
Kohlberg Investors X	2023	Buyout	Mount Kisco, NY	\$4.30B	+21.56%	1.17x	0.00x	1.17x				2 (Upper-Mid)
KPS Special Situations Fund VI	2023	Buyout	New York, NY	\$8.00B	-2.28%	0.98x	0.02x	0.95x				4 (Bottom)
KPS Special Situations Mid-Cap Fund II	2023	Buyout	New York, NY	\$1.70B			0.00x					
Leeds Equity Partners VIII	2023	Buyout	New York, NY	\$1.32B								
Lee Equity Partners Fund IV	2023	Buyout	New York, NY	\$1.32B	-7.27%	0.94x	0.00x	0.94x				4 (Bottom)
LightBay Investment Partners II	2023	Buyout	Los Angeles, CA	\$1.04B	-37.93%	0.55x	0.01x	0.55x				4 (Bottom)
Lindsay Goldberg VI	2023	Buyout	New York, NY	\$4.04B			0.00x					
Lovell Minnick Equity Partners VI	2023	Buyout	Philadelphia, PA	\$1.10B		1.05x	0.01x	1.04x	77.93%			
LS Power Equity Partners V	2023	Buyout	New York, NY	\$2.70B	+71.85%	1.31x	0.17x	1.14x	51.23%			1 (Top)
New Mountain Partners VII	2023	Buyout	New York, NY	\$15.43B		0.98x	0.00x	0.98x		1.75%	20.00%	

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Oaktree Power Opportunities Fund VI	2023	Buyout	Los Angeles, CA	\$2.00B	+27.00%	1.51x	0.41x	1.09x				2 (Upper-Mid)
OceanSound Partners Fund II	2023	Buyout	New York, NY	\$1.49B								
OEP Neptune Fund I	2023	Buyout	New York, NY	\$1.00B								
ONCAP V	2023	Buyout	Toronto, Canada	\$1.30B								
One Eagle Platform II	2023	Buyout	New York, NY	\$1.15B								
OneIM Fund I	2023	Buyout	New York, NY	\$8.00B								
Parthenon Investors VII		Buyout	Boston, MA	\$4.50B								
Percheron Capital Fund II	2023	Buyout	San Francisco, CA	\$1.55B		0.91x	0.01x	0.91x	83.33%			
Platinum Equity Small Cap Fund II	2023	Buyout	Los Angeles, CA	\$2.28B	+59.82%	1.42x	0.01x	1.41x				1 (Top)
PMC DeFi Equities I	2023	Diversified Private Equity	Washington, DC	\$2.50B								
Private Equity Portfolio 2023	2023	Buyout	San Francisco, CA	\$1.28B								
Providence Equity Partners IX	2023	Buyout	Providence, RI	\$3.21B								
Quantum Capital Solutions II	2023	Buyout	Houston, TX	\$2.80B	+18.96%	1.35x	0.21x	1.15x				2 (Upper-Mid)
Quartz Investors	2023	Buyout	Toronto, Canada	\$1.75B								
Searchlight Capital IV	2023	Buyout	New York, NY	\$2.62B	+1.92%	1.02x	0.00x	1.02x		1.85%	20.00%	3 (Lower-Mid)
Seidler Equity Partners VIII	2023	Buyout	Los Angeles, CA	\$1.25B								
Silver Lake Partners VII	2023	Buyout	Menlo Park, CA	\$20.50B	+14.65%	1.17x	0.01x	1.17x	67.98%			3 (Lower-Mid)

Fund Names	Vintage	Fund Type	Fund Location	Fund Size	IRR	TVPI	DPI	RVPI	Dry Powder	Mgmt Fee	Carry	IRR Quartile
Silver Lake Strategic Investors VI	2023	Buyout	Menlo Park, CA	\$1.20B	+20.70%	1.41x	0.00x	1.41x				2 (Upper-Mid)
Sixth Street Growth Partners II	2023	Growth/Expansion	San Francisco, CA	\$3.60B	+9.77%	1.16x	0.04x	1.12x	56.42%	1.50%	20.00%	3 (Lower-Mid)
SkyKnight Capital Fund IV	2023	Buyout	San Francisco, CA	\$1.03B	+20.90%	1.14x	0.02x	1.12x				2 (Upper-Mid)
The Resolute Fund VI	2023	Buyout	New York, NY	\$6.90B	+50.58%	1.29x	0.00x	1.29x	59.91%	1.75%	20.00%	1 (Top)
TPG Growth Fund VI	2023	Growth/Expansion	San Francisco, CA	\$4.80B	+31.00%	1.10x						1 (Top)
Trive Capital Fund V	2023	Buyout	Dallas, TX	\$2.70B		0.81x	0.01x	0.81x	81.55%			
Vista Equity Partners Fund VIII	2023	Buyout	Austin, TX	\$20.00B	+14.93%	1.09x	0.07x	1.03x	39.01%			2 (Upper-Mid)
Vivo Capital Fund X	2023	Growth/Expansion	Palo Alto, CA	\$1.50B								
WestView Capital Partners V	2023	Buyout	Boston, MA	\$1.00B		0.97x	0.01x	0.97x				
Windjammer Capital Fund VI	2023	Buyout	Newport Beach, CA	\$1.30B	-22.60%	0.83x	0.00x	0.83x				4 (Bottom)

Top 50 Peer Group Comparison

Fund Type: Private Equity	Fund Location: United States	Vintage: 2005 - 2025			Fund Size: \$34.96M - \$24.40B		
Investor	Location	Median	Number of Funds	Top Quartile	Upper-Mid Quartile	Lower-Mid Quartile	Bottom Quartile
Hellman & Friedman	United States	3	12	4	2	4	2
Thoma Bravo	United States	1	17	11	3	3	-
Francisco Partners	United States	1	10	6	3	1	-
GTCR	United States	1	7	5	1	1	-

Investor	Location	Median	Number of Funds	Top Quartile	Upper-Mid Quartile	Lower-Mid Quartile	Bottom Quartile
Genstar Capital	United States	1	7	4	1	1	1
JMI Equity	United States	1	7	4	2	1	-
Lexington Partners	United States	1	7	4	2	-	1
BV Investment Partners	United States	1	6	4	1	-	1
TJC (Private Equity)	United States	1	6	4	1	1	-
Valor Equity Partners	United States	1	6	4	1	1	-
SK Capital Partners	United States	1	6	4	-	1	1
Dragoneer Investment Group	United States	1	6	4	-	1	1
Lead Edge Capital	United States	1	6	4	1	1	-
Wynnchurch Capital	United States	1	5	3	-	1	1
Arlington Capital Partners	United States	1	5	3	2	-	-
Nautic Partners	United States	1	5	4	1	-	-
Pamlico Capital	United States	1	5	3	-	1	1
Alpine Investors	United States	1	5	3	1	1	-
GenNx360 Capital Partners	United States	1	5	3	-	1	1
Trinity Hunt Partners	United States	1	5	3	-	1	1
Peak Rock Capital	United States	1	5	3	1	1	-
Carousel Capital	United States	1	4	3	-	1	-
O2 Investment Partners	United States	1	4	3	1	-	-
Reverence Capital Partners	United States	1	4	3	1	-	-
Gemspring Capital	United States	1	4	3	-	-	1
SkyKnight Capital	United States	1	4	3	1	-	-
One Equity Partners	United States	1	3	2	-	-	1

Investor	Location	Median	Number of Funds	Top Quartile	Upper-Mid Quartile	Lower-Mid Quartile	Bottom Quartile
Monomoy Capital Partners	United States	1	3	3	-	-	-
Primus Capital	United States	1	3	2	1	-	-
Saw Mill Capital	United States	1	3	3	-	-	-
Linden (Chicago)	United States	1	3	2	-	1	-
LongueVue Capital	United States	1	3	3	-	-	-
Excellere Partners	United States	1	3	2	1	-	-
Wellington Management	United States	1	3	2	-	-	1
Dominus Capital	United States	1	3	2	1	-	-
A&M Capital	United States	1	3	2	1	-	-
One Rock Capital Partners	United States	1	3	2	-	-	1
Trive Capital	United States	1	3	2	-	1	-
LFM Capital	United States	1	3	2	1	-	-
Chicago Pacific Founders	United States	1	3	2	1	-	-
Arcline (Private Equity)	United States	1	3	3	-	-	-
Graycliff Partners	United States	1	2	2	-	-	-
VMG Partners	United States	1	2	2	-	-	-
Transom Capital Group	United States	1	2	2	-	-	-
Broadline Capital	United States	1	2	2	-	-	-
Silas Capital	United States	1	2	2	-	-	-
Sole Source Capital	United States	1	2	2	-	-	-
Hidden Harbor Capital Partners	United States	1	2	2	-	-	-
NextGen Growth Partners	United States	1	2	2	-	-	-
OceanSound Partners	United States	1	2	2	-	-	-

Fund Terms & Fees (5)

#	Fund Name	Fund Type	Vintage	Fund Term	Investment Term	Management Fee	Hurdle Rate	Carry	Final Split LP/GP
21	Hellman & Friedman Capital Partners X	Buyout	2021			1.50%		20.00%	80.00/20.00
13	Hellman & Friedman Capital Partners IX	Buyout	2019						
11	Hellman & Friedman Capital Partners VII	Buyout	2011			1.50%		20.00%	80.00/20.00
10	Hellman & Friedman Capital Partners VI	Buyout	2007	10 years		1.50%		20.00%	80.00/20.00
6	Hellman & Friedman Capital Partners VIII	Buyout	2016	10 years	6 years	1.50%		20.00%	80.00/20.00

Terms are based on assorted LP due diligence documents and may not fully represent the final terms of the fund
S Secondary Fund
FoF Fund of Funds
CI Co-Investment

Last 25 Filings

Type	Filed Date	Title
13F-HR	15-Nov-2021	Quarterly report filed by institutional managers, Holdings
13F-HR	13-Aug-2021	Quarterly report filed by institutional managers, Holdings
13F-HR	17-May-2021	Quarterly report filed by institutional managers, Holdings
13F-HR	16-Feb-2021	Quarterly report filed by institutional managers, Holdings
SC 13G/A	12-Feb-2021	Statement of acquisition of beneficial ownership by individuals - amendment
13F-HR	16-Nov-2020	Quarterly report filed by institutional managers, Holdings
13F-HR	14-Aug-2020	Quarterly report filed by institutional managers, Holdings
13F-HR	15-May-2020	Quarterly report filed by institutional managers, Holdings
SC 13G	14-Feb-2020	Statement of acquisition of beneficial ownership by individuals
13F-HR	14-Feb-2020	Quarterly report filed by institutional managers, Holdings
3	27-Jun-2019	Initial statement of beneficial ownership of securities
13F-HR	10-Nov-2015	Quarterly report filed by institutional managers, Holdings

Type	Filed Date	Title
13F-HR	13-Aug-2015	Quarterly report filed by institutional managers, Holdings
13F-HR	11-May-2015	Quarterly report filed by institutional managers, Holdings
13F-HR	11-Feb-2015	Quarterly report filed by institutional managers, Holdings
SC 13G/A	10-Feb-2015	Statement of acquisition of beneficial ownership by individuals - amendment
SC 13G/A	06-Feb-2015	Statement of acquisition of beneficial ownership by individuals - amendment
13F-HR	14-Nov-2014	Quarterly report filed by institutional managers, Holdings
13F-HR	07-Aug-2014	Quarterly report filed by institutional managers, Holdings
SC 13G	25-Jul-2014	Statement of acquisition of beneficial ownership by individuals
13F-HR	13-May-2014	Quarterly report filed by institutional managers, Holdings
SC 13G	14-Feb-2014	Statement of acquisition of beneficial ownership by individuals
SC 13G/A	13-Feb-2014	Statement of acquisition of beneficial ownership by individuals - amendment
13F-HR	11-Feb-2014	Quarterly report filed by institutional managers, Holdings
13F-HR	13-Nov-2013	Quarterly report filed by institutional managers, Holdings

Limited Partners (176)

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
Absolute Private Equity	Zurich, Switzerland	Fund of Funds	1	31-Dec-2010	Lucas Energy Ventures II	84
ACP Investment Group	Bethesda, MD	Investment Advisor	1	31-Dec-2008	Carlyle Partners V	72
Adams Street Partners	Chicago, IL	Fund of Funds	4	01-Oct-2025	India Business Excellence Fund V	2284
Agilent Technologies Deferred Profit-Sharing Plan	Santa Clara, CA	Corporate Pension	2	31-Dec-2003	Integral Capital Partners VI	86
Agilent Technologies Retirement Plan	Santa Clara, CA	Corporate Pension	2	31-Dec-2003	Integral Capital Partners VI	92

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
Alaska Permanent Fund	Juneau, AK	Sovereign Wealth Fund	7	06-Aug-2025	TPG Growth Fund VI	731
Alaska Retirement Management Board	Juneau, AK	Public Pension Fund	15	30-Jun-2025	Global Infrastructure Partners V	753
Alberta Investment Management	Edmonton, Canada	Money Management Firm		01-Nov-2024	Timbercreek Ireland Fund II	12
AMP Capital Investors	Sydney, Australia	Private Investment Fund		31-Dec-2010	Millennium Technology Value Partners II	6
Andra AP-fonden	Göteborg, Sweden	Public Pension Fund	3	15-Jan-2025	Australia New Zealand Landscapes and Forestry Fund	196
Andrew W. Mellon Foundation	New York, NY	Foundation	4	31-Oct-2024	Centerbridge Capital Partners V	396
Australia Future Fund	Melbourne, Australia	Sovereign Wealth Fund		01-Nov-2022	Blackbird Ventures 2022	25
Bain Capital	Boston, MA	Direct Investment	1	18-Sep-2023	Amazon Reforestation Investment Fund	20
Bell Atlantic Master Trust	Basking Ridge, NJ	Corporate Pension	9	24-Oct-2024	General Catalyst Group XII - Creation	604
BP Master Trust For Employee Pension Plans	Houston, TX	Corporate Pension	7	31-Dec-2022	Sequoia Capital U.S. Venture Fund XVII	230
Brighthouse Financial	Charlotte, NC	Insurance Company	1	16-Feb-2018	Bridgepoint Europe VI	336
British Columbia Investment Management	Victoria, Canada	Money Management Firm	6	19-Sep-2025	Macquarie Green Energy Transition Solutions	413
California Public Employees' Retirement System	Sacramento, CA	Public Pension Fund	23	10-Sep-2025	Veritas Capital Fund IX	2558
California State Teachers' Retirement System	West Sacramento, CA	Public Pension Fund	12	03-Sep-2025	Peak Rock Capital Fund IV	1042
Casey Family Programs	Seattle, WA	Foundation	2	19-Nov-2020	Endless Fund V	90

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
Charter Oak Fire Insurance Company	Hartford, CT	Insurance Company	1	20-Nov-2006	Hellman & Friedman Capital Partners VI	13
Chase Capital Partners	New York, NY	Banking Institution		01-Jan-2000	Voyager Capital Fund II	2
Chevron Master Pension Trust	San Ramon, CA	Corporate Pension	1	21-Dec-2018	Principal Real Estate Investors Separate Account	16
Christian Schools Pension Plan and Trust Fund	Grandville, MI	Corporate Pension	1	03-Aug-2021	Strategic Value Special Situations Fund V	34
Citigroup Pension Plan	Stamford, CT	Corporate Pension	2	31-Dec-2024	Third Point Partners	299
Colorado Public Employees' Retirement Association	Denver, CO	Public Pension Fund	1	03-Sep-2025	OHA CLO Enhanced Equity Master Fund III	629
Colorado School Division Pension	Denver, CO	Public Pension Fund	1	03-Sep-2025	OHA CLO Enhanced Equity Master Fund III	572
Columbia University Endowment	New York, NY	Endowment		10-Mar-2006	Charterhouse Capital Partners VIII	1
Commonfund	Wilton, CT	Fund of Funds	1	16-Jul-2025	Verified Capital Fund I	144
Commonwealth Superannuation Corporation	Sydney, Australia	Corporate Pension		14-Mar-2014	Riverside Asia-Pacific Fund II	1
Contra Costa County Employees' Retirement Association	Concord, CA	Public Pension Fund	2	30-Apr-2025	Arbor Investments VI	144
Conversus Capital	Saint Peter Port, United Kingdom	Fund of Funds		21-Jul-2020	JFL Equity Investors V	138
Corporate Solutions Life Reinsurance Company	West Chester, PA	Insurance Company	1	31-Dec-2024	PPH XII Investors	63
CPP Investments	Toronto, Canada	Public Pension Fund	7	24-Jul-2025	KB-Glenwood Private Equity Fund III	543
DuPont Pension Trust Fund	Wilmington, DE	Corporate Pension	2	31-Dec-2023	Rubicon Partners V	335

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
Egg Foundation	San Francisco, CA	Foundation	5	07-Dec-2022	Thoma Bravo Fund XV	17
Elo Mutual Pension Insurance	Espoo, Finland	Corporate Pension	3	09-Jul-2025	Levine Leichtman Capital Partners VII	437
Employees Retirement System of Texas	Austin, TX	Public Pension Fund	2	03-Sep-2025	Peak Rock Capital Fund IV	370
Employees' Retirement System of the State of Hawaii	Honolulu, HI	Public Pension Fund	5	11-Sep-2025	Aurora Equity Partners VII	459
Florida Retirement System Pension Plan	Tallahassee, FL	Public Pension Fund	7	13-May-2025	MCP Private Capital Fund V	553
Florida State Board of Administration	Tallahassee, FL	Public Pension Fund	7	03-Sep-2025	Peak Rock Capital Fund IV	720
Ford Foundation	New York, NY	Foundation	2	06-Sep-2025	Accion Venture Lab Fund II	246
Fort Worth Employees' Retirement Fund	Fort Worth, TX	Public Pension Fund	2	31-Dec-2022	Ascentris Value Add Fund III	92
Goldman Sachs Foundation	New York, NY	Foundation	5	24-Oct-2024	General Catalyst Group XII - Creation	89
Good Ventures	Mountain View, CA	Foundation	1	01-Jan-2021	IREP Opportunities Fund I	41
Good Ventures Foundation	Palo Alto, CA	Foundation	1	01-Jan-2021	IREP Opportunities Fund I	50
Government Pension Investment Fund of Japan	Tokyo, Japan	Public Pension Fund	1	29-Mar-2024	APG Infrastructure Asset Owner Fund II	15
Griffith R. Harsh, IV And Margaret C. Whitman Charitable Foundation	New York, NY	Foundation	3	31-Dec-2023	Blackstone ISG Investment Partners	57
Hamilton Lane	Conshohocken, PA	Fund of Funds	1	01-Jun-2026	Oak Hill Capital Partners VII	347
HarbourVest Partners	Boston, MA	Fund of Funds	5	15-Jul-2025	Norvestor SPV III	1135
Houston Firefighters' Relief and Retirement Fund	Houston, TX	Public Pension Fund	3	18-Jul-2025	Bridgepoint Direct Lending IV	226

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
Houston Municipal Employees' Pension System	Houston, TX	Public Pension Fund	4	25-Aug-2025	Platinum Equity Small Cap Fund II	254
Howard University Employees' Retirement Plan	Washington, DC	Corporate Pension	3	22-Apr-2020	Southwest Value Partners Fund XXI	89
HP Deferred Profit-Sharing Plan	Spring, TX	Corporate Pension	2	14-Sep-2016	WCP Special Core Plus Fund	94
HP Pension Plan	Spring, TX	Corporate Pension	2	21-Jan-2013	Serent Capital II	85
IBM Personal Pension Plan	Armonk, NY	Corporate Pension	6	12-Feb-2021	Clayton, Dubilier & Rice Fund XI	664
ICG Enterprise Trust	London, United Kingdom	Fund of Funds	2	20-Mar-2025	ICG Europe Mid-Market Fund II	229
Idaho National Laboratory Employee Retirement Plan	Idaho Falls, ID	Corporate Pension	1	21-Mar-2022	Certares Holdings	24
Illinois Municipal Retirement Fund	Oak Brook, IL	Public Pension Fund	4	03-Sep-2025	Great Hill Equity Partners IX	572
Indiana Public Employees' Defined Benefit Account	Indianapolis, IN	Public Pension Fund	3	31-Dec-2017	Austin Ventures X	232
Indiana Public Retirement System	Indianapolis, IN	Public Pension Fund	10	10-Sep-2025	Veritas Capital Fund IX	503
Iowa Public Employees' Retirement System	Des Moines, IA	Public Pension Fund	5	25-May-2023	ArrowMark Global Opportunity Fund IV	288
Ireland Strategic Investment Fund	Dublin, Ireland	Sovereign Wealth Fund	1	15-Sep-2025	Erisbeg Fund II	234
J.C. Penney Corporation Pension Plan	Plano, TX	Corporate Pension	1	31-Dec-2017	Austin Ventures X	147
John D. and Catherine T. MacArthur Foundation	Chicago, IL	Foundation	4	12-Feb-2025	Ulu Ventures Fund IV	756
John Deere Pension Plan For Salaried Employees	Moline, IL	Corporate Pension				
John Deere Pension Trust (Master Trust)	Moline, IL	Corporate Pension	2	31-Dec-2017	Brookfield Infrastructure Partners Fund	63

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
J. Paul Getty Trust	Los Angeles, CA	Foundation	4	31-Dec-2017	Sequoia Capital China Growth Fund IV	327
Kansas City Public School Retirement System	Kansas City, MO	Public Pension Fund	3	30-Jul-2024	Platinum Equity Capital Partners VI	148
Kansas Public Employees Retirement System	Topeka, KS	Public Pension Fund	4	25-Aug-2025	Platinum Equity Small Cap Fund II	224
Kansas Retirement System for Judges	Topeka, KS	Public Pension Fund	3	01-Jan-2024	AEW Senior Housing Investors V	120
Kentucky Public Pensions Authority	Frankfort, KY	Public Pension Fund	1	13-May-2025	Kayne Private Energy Income Fund III	150
Kentucky Teachers Medical Health Insurance Trust	Frankfort, KY	Public Pension Fund	1	04-Sep-2025	AlpInvest Partners Fund VIII - Secondary Investments	85
Kentucky Teachers' Retirement System	Frankfort, KY	Public Pension Fund	3	04-Sep-2025	AlpInvest Partners Fund VIII - Secondary Investments	142
Keva (Helsinki)	Helsinki, Finland	Public Pension Fund	3	09-Apr-2025	Blackstone Real Estate Partners Europe VII	381
Korean Teachers' Credit Union	Seoul, South Korea	Public Pension Fund		24-Jul-2025	KB-Glenwood Private Equity Fund III	29
Lasker Foundation	New York, NY	Foundation	2	10-Oct-2023	Warburg Pincus Global Growth XIV	46
Lexington Partners	New York, NY	Secondary LP	6	28-Aug-2025	Lakestar Continuation Fund	891
Lockheed Martin Master Retirement Trust	Bethesda, MD	Corporate Pension	1	31-Dec-2022	Ellis Capital Fund	302
Lorillard Tobacco Company Retirement Master Trust	Winston-Salem, NC	Corporate Pension	1	03-Jul-2018	Ardian Secondary Fund VI Energy	51
Los Angeles City Employees' Retirement System	Los Angeles, CA	Public Pension Fund	11	25-Aug-2025	Platinum Equity Small Cap Fund II	540
Los Angeles County Employees' Retirement Association	Pasadena, CA	Public Pension Fund	6	17-Sep-2025	Pennybacker Critical Infrastructure Partners I	662

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
Los Angeles Fire and Police Pension System	Los Angeles, CA	Public Pension Fund	8	25-Sep-2025	Ridgmont Equity Partners V	618
Louisiana State Employees' Retirement System	Baton Rouge, LA	Public Pension Fund	1	18-Nov-2024	Gramercy Capital Solutions Fund III	165
Lucent Technologies Master Pension Trust	Mountain Avenue, NJ	Corporate Pension	9	26-Apr-2022	Andreessen Horowitz Seed Fund I	402
Lucent Technologies Pension Plan	Murray Hil, NJ	Corporate Pension				
Maine Public Employees Retirement System	Augusta, ME	Public Pension Fund	4	03-Sep-2025	Great Hill Equity Partners IX	324
Maryland State Retirement and Pension System	Baltimore, MD	Public Pension Fund	6	30-Jun-2025	Global Infrastructure Partners V	566
Massachusetts Pension Reserves Investment Trust	Boston, MA	Public Pension Fund	14	11-Aug-2025	JMI Equity Fund XII	630
Mesirow Financial	Chicago, IL	Investment Advisor	4	05-Apr-2022	Thoma Bravo Credit Fund II	172
Mesirow Financial Private Equity Advisors	Chicago, IL	Investment Advisor	1	31-Jan-2014	JER Europe Fund II	27
Metlife Life & Annuity Company of CT	Bloomfield, CT	Insurance Company	1	16-Nov-2006	Terra Firma Capital Partners III	54
MGB Erisa Master Trust	Somerville, MA	Corporate Pension	4	13-Jul-2023	Sequoia Capital US/E Seed Fund IV	341
Michigan Department of Treasury	Lansing, MI	Government Agency	1	01-Oct-2027	Carlyle Partners Growth Fund	938
Minnesota State Board of Investment	Saint Paul, MN	Public Pension Fund	9	01-Jan-2026	Blue Owl GP Stakes VI	502
Montana Board of Investments	Helena, MT	Public Pension Fund	4	02-Apr-2025	Strategic Partners U.S. Value 9	384
Nevada Public Employees Retirement System	Carson City, NV	Public Pension Fund	9	14-Jul-2025	Trident X Fund	440
New Jersey Division of Investment	Trenton, NJ	Public Pension Fund	3	04-Aug-2025	Carlyle Realty Partners X	432

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
New Mexico Public Employees' Retirement Association	Santa Fe, NM	Public Pension Fund	8	04-Apr-2025	TB Co-Invest Opportunities	246
New Mexico State Investment Council	Santa Fe, NM	Sovereign Wealth Fund	2	10-Sep-2025	Veritas Capital Fund IX	600
New York State Common Retirement Fund	Albany, NY	Public Pension Fund	10	11-Sep-2025	Aurora Equity Partners VII	1293
New York State Nurses Association Pension Plan	Albany, NY	Union Pension Fund	10	01-Jan-2024	Angel Oak Real Estate Investment Fund III	318
New York State Teachers' Retirement System	Albany, NY	Public Pension Fund	8	14-May-2025	Crestline Direct Lending Fund IV	622
New Zealand Superannuation Fund	Auckland, New Zealand	Sovereign Wealth Fund	2	05-Mar-2025	Direct Capital VII	90
Ohio Public Employees Retirement System	Columbus, OH	Public Pension Fund	6	18-Apr-2025	LLR Equity Partners VII	337
Ontario Municipal Employees Retirement System	Toronto, Canada	Public Pension Fund	2	30-Oct-2024	Berkshire Fund XI	55
Orange County Employees' Retirement System	Santa Ana, CA	Public Pension Fund	3	07-Jul-2025	One Rock Capital Partners IV	463
Oregon Investment Council	Salem, OR	Public Pension Fund	3	10-Sep-2025	Veritas Capital Fund IX	224
Oregon Public Employees Retirement System	Tigard, OR	Public Pension Fund	4	10-Sep-2025	Veritas Capital Fund IX	752
Pantheon Ventures	London, United Kingdom	Fund of Funds	2	30-Apr-2025	JFL Credit Opportunities Fund I	508
Partners Group	Zug, Switzerland	Money Management Firm	1	03-Apr-2025	Suma Capital Single Asset Continuation Fund	258
Partners Group Global Value	Munsbach, Luxembourg	Private Investment Fund	3	09-Jan-2025	Vistria Fund V	314
Partners Group Private Equity Performance Holding	Saint Peter Port, United Kingdom	Fund of Funds	2	27-Feb-2024	EQT X	407

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
Pennsylvania Public School Employees Retirement System	Harrisburg, PA	Public Pension Fund	2	31-Dec-2025	ACORE Opportunistic Credit II Fund	647
Pennsylvania State Employees' Retirement System	Harrisburg, PA	Public Pension Fund	10	15-May-2025	Blue Owl Digital Infrastructure Fund III	659
Pension Benefit Guaranty	Washington, DC	Government Agency	2	01-Jan-2021	Summit Partners Reinvestment Fund	474
Pomona Capital	New York, NY	Direct Investment	4	28-Mar-2008	Mithras Capital Fund	190
Primerica Life Insurance Company	Duluth, GA	Insurance Company	1	12-Apr-2007	EnerVest Partners XI	58
Public School and Education Employee Retirement Systems of Missouri	Jefferson City, MO	Public Pension Fund	1	05-Dec-2024	H.I.G. Bayside Loan Opportunity Fund VII	231
Quad Family Foundation	Cohoes, NY	Foundation	2	14-Sep-2023	Galvanize Innovation & Expansion Fund I	12
Reliastar Life Insurance Company	Atlanta, GA	Insurance Company	2	30-Jun-2025	Global Infrastructure Partners V	239
Retirement Plan for Employees of Lorillard Tobacco Company	Greensboro, NC	Corporate Pension	1	01-Mar-2013	Rockpoint Real Estate Fund IV	24
Reynolds American Defined Benefit Master Trust	Winston-Salem, NC	Corporate Pension	2	31-May-2022	Buckingham Multifamily Fund II	165
Robert Wood Johnson Foundation	Princeton, NJ	Foundation	1	31-Dec-2022	Sequoia Capital U.S. Venture Fund XVII	510
Sanabil Investments	Riyadh, Saudi Arabia	Economic Development Agency		03-Mar-2017	Pramerica Real Estate Capital VI	3
San Diego County Employees' Retirement Association	San Diego, CA	Public Pension Fund	2	31-Dec-2022	Ascentris Value Add Fund III	144
San Francisco Employees' Retirement System	San Francisco, CA	Public Pension Fund	15	11-Jul-2025	Stripes VII	816

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
Santa Barbara County Employees Retirement System	Goleta, CA	Public Pension Fund	5	15-Sep-2025	ICG Infrastructure Fund II	270
SBC Master Pension Trust	Dallas, TX	Corporate Pension	1	23-Sep-2022	CPE China Fund IV	722
Sears Holdings Pension Plan 1	Hoffman Estates, IL	Corporate Pension	2	01-Jan-2001	Bay Partners X	29
Sears Holdings Savings Plan Master Trust	Hoffman Estates, IL	Corporate Pension	2	01-Jan-2001	Bay Partners X	31
Security Life of Denver Insurance Company	West Chester, PA	Insurance Company	1	31-Dec-2020	Vista Foundation Fund IV	94
Shell Pension Plan	Houston, TX	Corporate Pension	1	01-Dec-2021	Magnum Capital III	128
Shimon ben Joseph Foundation	San Francisco, CA	Foundation	2	01-Jan-2020	Northgate Venture Growth I	74
Simpson Group Retirement Fund Master Trust	Seattle, WA	Corporate Pension	1	01-Jul-1996	Abbott Capital Private Equity Fund	3
South Carolina Retirement System Investment Commission	Columbia, SC	Public Pension Fund	1	30-Jul-2025	KKR Asset-Based Finance Partners II	248
Sprint Retirement Pension Plan	Overland Park, KS	Corporate Pension	1	31-Dec-2021	TriplePoint Venture Lending U.S. Fund	18
State of Michigan Retirement Systems	East Lansing, MI	Public Pension Fund	1	01-Oct-2027	Carlyle Partners Growth Fund	757
State of Wisconsin Investment Board	Madison, WI	Public Pension Fund	5	14-Jul-2025	Trident X Fund	875
State Teachers Retirement System of Ohio	Columbus, OH	Public Pension Fund	5	13-Aug-2025	Audax Private Equity Solutions Fund	676
State Universities Retirement System	Champaign, IL	Public Pension Fund	3	09-Apr-2025	Blackstone Real Estate Partners Europe VII	480
StepStone Private Wealth	Charlotte, NC	Wealth Management Firm	3	13-Aug-2025	Audax Private Equity Solutions Fund	386

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
St. Paul Fire and Marine Insurance Company	Hartford, CT	Insurance Company	1	14-Jul-2025	Trident X Fund	222
Strategic Partners Fund Solutions	New York, NY	Secondary LP	1	14-Apr-2023	Beecken Petty O'Keefe Fund IV - CV Fund	262
Sutter Health Master Trust	Sacramento, CA	Corporate Pension	1	01-Jan-2020	AG Credit Solutions Fund	34
Sutter Health Retirement Plan	Sacramento, CA	Corporate Pension	1	31-Dec-2021	A&E Real Estate Fund	98
Teacher Retirement System of Texas	Austin, TX	Public Pension Fund	7	31-Dec-2026	TPG Partners X	842
Teachers Insurance and Annuity Association of America	New York, NY	Insurance Company	2	08-Sep-2025	One Equity Partners IX	962
Teachers' Retirement System of Louisiana	Baton Rouge, LA	Public Pension Fund	8	15-Sep-2025	Asterion Industrial Infra Fund III	424
Tennessee Consolidated Retirement System	Nashville, TN	Public Pension Fund	3	03-Sep-2025	Great Hill Equity Partners IX	215
Texas County & District Retirement System	Austin, TX	Public Pension Fund	8	04-Aug-2025	OrbiMed Royalty & Credit Opportunities V	658
Texas Permanent School Fund	Austin, TX	Endowment	3	19-Sep-2025	Macquarie Green Energy Transition Solutions	386
T. Gary and Kathleen Rogers Private Family Foundation	Oakland, CA	Foundation	1	31-Mar-2016	IEC Institutional Fund III	24
The California Endowment	Los Angeles, CA	Foundation	2	30-Oct-2024	BBG Ventures Diverse Founders Fund	59
The Children's Hospital of Philadelphia Master Trust	Philadelphia, PA	Corporate Pension	1	01-Mar-2013	EnerVest Energy Institutional Fund XIII	37
The Florida Retirement System	Tallahassee, FL	Public Pension Fund	1	31-May-2021	CVI Credit Value Fund V	32
The Ford Family Foundation	Roseburg, OR	Foundation	4	23-Jun-2020	Sculptor Real Estate IV	128

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
The James Irvine Foundation	San Francisco, CA	Foundation	2	01-Jul-2017	Abingworth Bioventures III	135
The Kroger Company Master Retirement Trust	Cincinnati, OH	Corporate Pension	2	31-Dec-2022	Amica Co-Invest	208
The Prudential Insurance Company of America	Newark, NJ	Insurance Company	4	01-Aug-2025	PGIM Senior Loan Opportunities II	632
The Roche Retirement Plan	Little Falls, NJ	Corporate Pension	1	11-Mar-2014	Metamorphic Ventures II	83
The Rockefeller Foundation	New York, NY	Foundation	1	16-Sep-2025	Mad Capital Perennial Fund II	452
The Southern Company Pension Plan	Atlanta, GA	Corporate Pension	1	04-Apr-2022	Edison Partners X	150
The University of Texas/Texas A&M Investment Management Company	Austin, TX	Endowment	3	17-Sep-2025	Pennybacker Critical Infrastructure Partners I	1032
Travelers Indemnity Company	Hartford, CT	Insurance Company	1	31-Dec-2022	Stepstone Mezzanine Partners I	207
U.F.C.W. Consolidated Pension Fund	Atlanta, GA	Union Pension Fund	6	31-Dec-2024	Third Point Partners	286
UniSuper Superannuation Fund	Melbourne, Australia	Corporate Pension	2	22-Dec-2022	Long Term Private Capital Fund	84
Ventura County Employees' Retirement Association	Ventura, CA	Public Pension Fund	3	01-Mar-2026	Adams Street Co-Investment Fund VI	162
Verizon Communications	New York, NY	Corporation		18-Aug-2007	Syndicated Communications Venture Partners V	3
Virginia Retirement System	Richmond, VA	Public Pension Fund	4	10-Sep-2025	Veritas Capital Fund IX	286
Voya Financial	New York, NY	Insurance Company		02-Nov-2015	ComVest Investment Partners V	40
Voya Retirement Insurance and Annuity Company	Atlanta, GA	Insurance Company	2	03-Sep-2025	Peak Rock Capital Fund IV	223
Washington State Investment Board	Olympia, WA	Public Pension Fund	8	31-Dec-2026	TPG Partners X	610

Limited Partner	LP Location	Type	Commitments to Hellman & Friedman	Last Commit. Date	Last Committed Fund	Total Commitments
West Virginia Investment Management Board	Charleston, WV	Public Pension Fund	1	10-Sep-2025	Veritas Capital Fund IX	257
William H. Hannon Foundation	Santa Monica, CA	Foundation		12-Jan-2011	Morgan Stanley Credit Partners	2
Zurich North America	Schaumburg, IL	Insurance Company	2	20-Sep-2024	Vitruvian Investment Partnership V	100

Service Providers

General Service (16)

Service Provider Name	Service Provided	Comments
Accordion	Advisor: General	
Cerulli Associates	Advisor: General	
CLP Strategies	Advisor: Communications	
CPI	Consulting	
Davidson Tyler	Consulting	
Grove Capital Partners	Advisor: General	
H/Advisors Abernathy	Advisor: Communications	
Jamesbeck	Advisor: General	
Montfort Communications	Advisor: General	
Murray Devine & Company	Valuation/Appraiser	
Renovata Partners	Advisor: General	
STJ Advisors	Advisor: General	
TBM Consulting Group	Consulting	
The Lancer Group	Consulting	
Union Square Advisors	Advisor: General	

Service Provider Name	Service Provided	Comments				
Walker Hamill	Consulting					
Service on a Deal (216)						
Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments	
Simpson Thacher & Bartlett	Legal Advisor	SimpliSafe	03-Sep-2025	10		
Citigroup	Advisor: General	Enverus	06-Aug-2025	23		
Kirkland & Ellis	Legal Advisor	Enverus	06-Aug-2025	23		
Morgan Stanley	Advisor: General	Enverus	06-Aug-2025	23		
Kirkland & Ellis	Legal Advisor	Regina Maria	01-Apr-2025	6		
Kirkland & Ellis	Legal Advisor	Mehiläinen	01-Apr-2025	16		
Schonherr	Legal Advisor	Mehiläinen	01-Apr-2025	16		
Davies Ward Phillips & Vineberg	Legal Advisor	Trader	12-Dec-2024	11		
Houlihan Lokey	Advisor: General	Trader	12-Dec-2024	11		
Simpson Thacher & Bartlett	Legal Advisor	Trader	12-Dec-2024	11	Start Date:	25-Mar-2011
Citigroup	Advisor: General	Checkmarx	10-Sep-2024	9		
Jefferies Financial Group	Advisor: General	Safe-Guard Products International	15-Jul-2024	15		
Kirkland & Ellis	Legal Advisor	Safe-Guard Products International	15-Jul-2024	15		
Waller Helms Advisors	Advisor: General	Safe-Guard Products International	15-Jul-2024	15		
Kirkland & Ellis	Legal Advisor	Splunk	18-Mar-2024	8		
Simpson Thacher & Bartlett	Legal Advisor	Baker Tilly (Chicago)	07-Feb-2024	2		

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments	
Vedder Price	Legal Advisor	Baker Tilly (Chicago)	07-Feb-2024	2		
Simpson Thacher & Bartlett	Legal Advisor	Hub International	14-Sep-2023	39		
Evercore Group	Advisor: General	TeamSystem	19-May-2023	16		
FGS Global	Advisor: Communications	TeamSystem	19-May-2023	16		
FGS Global	Advisor: Communications	MedAlliance (Drug Delivery)	01-Jan-2023	4		
Ares Management	Advisor: General	Zendesk	22-Nov-2022	13		
Fried, Frank, Harris, Shriver & Jacobson	Legal Advisor	Zendesk	22-Nov-2022	13		
Kirkland & Ellis	Legal Advisor	Zendesk	22-Nov-2022	13		
Morgan Stanley	Advisor: General	Zendesk	22-Nov-2022	13		
Simpson Thacher & Bartlett	Legal Advisor	Zendesk	22-Nov-2022	13		
Jefferies Financial Group	Advisor: General	Information Resources	01-Aug-2022	22	Start Date:	01-Apr-2011
Simpson Thacher & Bartlett	Legal Advisor	Information Resources	01-Aug-2022	22		
Osler, Hoskin & Harcourt	Legal Advisor	PointClickCare	22-Apr-2022	10		
Simpson Thacher & Bartlett	Legal Advisor	Splunk	22-Feb-2022	7		
Simpson Thacher & Bartlett	Legal Advisor	Curriculum Associates	21-Jan-2022	7		
Latham & Watkins	Legal Advisor	Belron	17-Dec-2021	13		
Loyens & Loeff	Legal Advisor	Belron	17-Dec-2021	13		
The Goldman Sachs Group	Advisor: General	Belron	17-Dec-2021	13		

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments
Barclays	Advisor: General	Athenahealth	26-Nov-2021	24	
BMO Capital Markets	Advisor: General	Athenahealth	26-Nov-2021	24	
BofA Securities	Advisor: General	Athenahealth	26-Nov-2021	24	
Deutsche Bank Securities	Advisor: General	Athenahealth	26-Nov-2021	24	
Kirkland & Ellis	Legal Advisor	Athenahealth	26-Nov-2021	24	
Morgan Stanley	Advisor: General	Athenahealth	26-Nov-2021	24	
CMS	Legal Advisor	Cordis	02-Aug-2021	3	
Fasken Martineau DuMoulin	Legal Advisor	Cordis	02-Aug-2021	3	
Kirkland & Ellis	Legal Advisor	Cordis	02-Aug-2021	3	
UBS Group	Advisor: General	Cordis	02-Aug-2021	3	
Guggenheim Partners	Advisor: General	At Home Stores	23-Jul-2021	17	
Simpson Thacher & Bartlett	Legal Advisor	At Home Stores	23-Jul-2021	17	
Credit Suisse	Advisor: General	Nets	01-Jul-2021	10	
Elvinger Hoss & Prussen	Legal Advisor	Nets	01-Jul-2021	10	
Credit Suisse	Advisor: General	Enverus	10-Jun-2021	17	
FGS Global	Advisor: Communications	Enverus	10-Jun-2021	17	
Kirkland & Ellis	Legal Advisor	Enverus	10-Jun-2021	17	
Osler, Hoskin & Harcourt	Legal Advisor	Enverus	10-Jun-2021	17	
Bank of America	Advisor: General	Medline Industries	05-Jun-2021	3	
Barclays	Advisor: General	Medline Industries	05-Jun-2021	3	
Centerview Partners	Advisor: General	Medline Industries	05-Jun-2021	3	

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments
J.P. Morgan (New York)	Advisor: General	Medline Industries	05-Jun-2021	3	
Morgan Stanley	Advisor: General	Medline Industries	05-Jun-2021	3	
Simpson Thacher & Bartlett	Legal Advisor	Medline Industries	05-Jun-2021	3	
Latham & Watkins	Legal Advisor	Checkmarx	18-Feb-2021	7	
Simpson Thacher & Bartlett	Legal Advisor	Vantage Risk	03-Dec-2020	1	
Simpson Thacher & Bartlett	Legal Advisor	Sprinklr	09-Sep-2020	9	
Elvinger Hoss & Prussen	Legal Advisor	Checkmarx	16-Mar-2020	6	
Erdinast, Ben Nathan, Toledano & Co. With Hamburger Evron	Legal Advisor	Checkmarx	16-Mar-2020	6	
RBC Capital Markets	Advisor: General	Checkmarx	16-Mar-2020	6	
Simpson Thacher & Bartlett	Legal Advisor	Checkmarx	16-Mar-2020	6	
Freshfields	Legal Advisor	AutoScout24	14-Feb-2020	3	
Tomorrow Partners	Advisor: General	AutoScout24	14-Feb-2020	3	
Simpson Thacher & Bartlett	Legal Advisor	PointClickCare	01-Jan-2020	7	
Freshfields	Legal Advisor	Action Nederland	21-Nov-2019	9	
Freshfields	Legal Advisor	Action (Poland)	18-Nov-2019	3	
Skadden, Arps, Slate, Meagher & Flom	Legal Advisor	Argus Media	22-Oct-2019	5	
Latham & Watkins	Legal Advisor	Scout24	14-May-2019	13	
Qatalyst Partners	Advisor: General	Ultimate Software Group	03-May-2019	4	

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments
Latham & Watkins	Legal Advisor	Verisure	04-Apr-2019	16	Contact: David Walker End Date: 16-Oct-2015
BofA Securities	Advisor: General	Caliber Collision	24-Jan-2019	12	
Deutsche Bank Securities	Advisor: General	Caliber Collision	24-Jan-2019	12	
Simpson Thacher & Bartlett	Legal Advisor	Caliber Collision	24-Jan-2019	12	
Simpson Thacher & Bartlett	Legal Advisor	Hub International	28-Nov-2018	20	
Simpson Thacher & Bartlett	Legal Advisor	Applied Systems	16-Oct-2018	16	
Simpson Thacher & Bartlett	Legal Advisor	SimpliSafe	03-Aug-2018	4	
Centerview Partners	Advisor: General	Openlink Financial	22-Mar-2018	7	
Simpson Thacher & Bartlett	Legal Advisor	Openlink Financial	22-Mar-2018	7	
BofA Securities	Advisor: General	Nets	13-Feb-2018	6	
Deutsche Bank Securities	Advisor: General	Nets	13-Feb-2018	6	
Ernst & Young Global	Tax	Nets	13-Feb-2018	6	
Ernst & Young Global	Advisor: Financial Due Diligence	Nets	13-Feb-2018	6	
Freshfields	Legal Advisor	Nets	13-Feb-2018	6	
Kromann Reumert	Legal Advisor	Nets	13-Feb-2018	6	
Latham & Watkins	Legal Advisor	Nets	13-Feb-2018	6	
MHS Corporate Finance	Advisor: General	Nets	13-Feb-2018	6	
Morgan Stanley	Advisor: General	Nets	13-Feb-2018	6	

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments	
Thommessen	Legal Advisor	Nets	13-Feb-2018	6		
Vinge	Legal Advisor	Nets	13-Feb-2018	6		
Waselius	Legal Advisor	Nets	13-Feb-2018	6		
Arcano	Advisor: General	Allfunds Bank	21-Nov-2017	3		
Barclays UK	Advisor: General	Allfunds Bank	21-Nov-2017	3		
Bar & Karrer	Legal Advisor	Allfunds Bank	21-Nov-2017	3		
Citibank Group	Advisor: General	Allfunds Bank	21-Nov-2017	3		
Freshfields	Legal Advisor	Allfunds Bank	21-Nov-2017	3		
Ogier	Legal Advisor	Allfunds Bank	21-Nov-2017	3		
Ropes & Gray	Legal Advisor	Allfunds Bank	21-Nov-2017	3		
Tomorrow Partners	Advisor: General	Allfunds Bank	21-Nov-2017	3		
Simpson Thacher & Bartlett	Legal Advisor	Applied Systems	11-Sep-2017	14		
Simpson Thacher & Bartlett	Legal Advisor	Snap One	04-Aug-2017	4	Start Date:	20-Jun-2017
SunTrust Robinson Humphrey	Advisor: General	Snap One	04-Aug-2017	4	Start Date:	20-Jun-2017
UBS Group	Advisor: General	Snap One	04-Aug-2017	4	Start Date:	20-Jun-2017
Latham & Watkins	Legal Advisor	Verisure	01-Jul-2017	13	Contact: End Date:	David Walker 16-Oct-2015
Weil, Gotshal & Manges	Legal Advisor	Associated Materials	22-Nov-2016	16		
Credit Suisse	Underwriter	Scout24	23-Sep-2016	8		
Simpson Thacher & Bartlett	Legal Advisor	Genesys	21-Jul-2016	16		

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments	
Barclays	Advisor: General	Claritev	01-Jun-2016	14		
Davis Polk	Legal Advisor	Claritev	01-Jun-2016	14		
Ropes & Gray	Legal Advisor	Claritev	01-Jun-2016	14		
Simpson Thacher & Bartlett	Legal Advisor	Claritev	01-Jun-2016	14		
The Goldman Sachs Group	Advisor: General	Claritev	01-Jun-2016	14		
Travers Smith	Legal Advisor	Hostelworld Group	22-Apr-2016	4	Contact:	Adrian West
Simpson Thacher & Bartlett	Legal Advisor	Ellucian	31-Dec-2015	15		
Ernst & Young Global	Advisor: Financial Due Diligence	TeamSystem	07-Dec-2015	9	Start Date:	07-Dec-2015
Ernst & Young Global	Tax	TeamSystem	07-Dec-2015	9	Start Date:	07-Dec-2015
KPMG	Advisor: General	TeamSystem	07-Dec-2015	9		
Mediobanca	Advisor: General	TeamSystem	07-Dec-2015	9	Start Date:	03-Aug-2010
Morgan Stanley	Advisor: General	Edelman Financial Engines	12-Oct-2015	4	Start Date:	12-Oct-2015
Simpson Thacher & Bartlett	Legal Advisor	Edelman Financial Engines	12-Oct-2015	4	Start Date:	12-Oct-2015
UBS Group	Advisor: General	Edelman Financial Engines	12-Oct-2015	4	Start Date:	12-Oct-2015
Willkie Farr & Gallagher	Legal Advisor	Edelman Financial Engines	12-Oct-2015	4	Start Date:	12-Oct-2015
Ernst & Young Global	Advisor: General	Verisure	06-Oct-2015	8	End Date:	16-Oct-2015

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments	
Latham & Watkins	Legal Advisor	Verisure	06-Oct-2015	8	Contact: David Walker	End Date: 16-Oct-2015
Tomorrow Partners	Advisor: General	Verisure	06-Oct-2015	8		
Vinge	Legal Advisor	Verisure	06-Oct-2015	8		
Dickson Minto	Legal Advisor	Wood Mackenzie	19-May-2015	12	Start Date:	10-Mar-2015
Freshfields	Legal Advisor	Wood Mackenzie	19-May-2015	12	Start Date:	10-Mar-2015
The Goldman Sachs Group	Advisor: General	Wood Mackenzie	19-May-2015	12	Start Date:	29-May-2009
Rothschild & Co	Advisor: General	SSP (United Kingdom)	12-Mar-2015	6	Start Date:	26-Sep-2014
Travers Smith	Legal Advisor	SSP (United Kingdom)	12-Mar-2015	6	Contact: Paul Dolman	Start Date: 16-Mar-2015
Deutsche Bank	Advisor: General	Grocery Outlet Holding	07-Oct-2014	7		
Morgan Stanley	Advisor: General	Grocery Outlet Holding	07-Oct-2014	7		
Simpson Thacher & Bartlett	Legal Advisor	Grocery Outlet Holding	07-Oct-2014	7		
Simpson Thacher & Bartlett	Legal Advisor	Internet Brands	31-Aug-2014	8	Start Date:	17-Dec-2010
					End Date:	31-Aug-2014
Compass Lexecon	Consulting	ABRA Auto Body & Glass	28-Aug-2014	7		
Fried, Frank, Harris, Shriver & Jacobson	Legal Advisor	ABRA Auto Body & Glass	28-Aug-2014	7		

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments	
Greenberg Traurig	Legal Advisor	ABRA Auto Body & Glass	28-Aug-2014	7	Start Date:	05-Aug-2014
Simpson Thacher & Bartlett	Legal Advisor	ABRA Auto Body & Glass	28-Aug-2014	7		
BofA Securities	Advisor: General	Renaissance Learning	11-Apr-2014	6		
Credit Suisse	Advisor: General	Renaissance Learning	11-Apr-2014	6	Start Date:	13-Mar-2014
RBC Capital Markets	Advisor: General	Renaissance Learning	11-Apr-2014	6	Start Date:	16-Aug-2011
Simpson Thacher & Bartlett	Legal Advisor	Renaissance Learning	11-Apr-2014	6	Start Date:	13-Mar-2014
BofA Securities	Advisor: General	Catalina Marketing (Saint Petersburg)	09-Apr-2014	11	Start Date:	09-Jan-2014
Latham & Watkins	Legal Advisor	Scout24	01-Feb-2014	3		
Rautenberg & Company	Advisor: General	Scout24	01-Feb-2014	3		
Tomorrow Partners	Advisor: General	Scout24	01-Feb-2014	3		
Osler, Hoskin & Harcourt	Legal Advisor	Applied Systems	24-Jan-2014	11		
Dowling & Hales	Advisor: General	Hub International	02-Oct-2013	8		
Torys	Legal Advisor	Hub International	02-Oct-2013	8		
Ernst & Young Global	Advisor: Financial Due Diligence	HostelBookers.com	27-Aug-2013	1		
Ernst & Young Global	Tax	HostelBookers.com	27-Aug-2013	1		
Osler, Hoskin & Harcourt	Legal Advisor	CARFAX Canada	19-Aug-2013	1	Start Date:	05-Aug-2013
Simpson Thacher & Bartlett	Legal Advisor	Getty Images Holdings	18-Oct-2012	9		

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments
BofA Securities	Advisor: General	AlixPartners	29-Jun-2012	3	
Simpson Thacher & Bartlett	Legal Advisor	AlixPartners	29-Jun-2012	3	Contact: Maripat Alpuche JD
The Goldman Sachs Group	Advisor: General	AlixPartners	29-Jun-2012	3	
Willkie Farr & Gallagher	Legal Advisor	AlixPartners	29-Jun-2012	3	Contact: Thomas Cerabino JD
Barclays Investment Bank	Advisor: General	SunGard Higher Education Managed Services	23-Jan-2012	4	Start Date: 05-Aug-2011
Citigroup	Advisor: General	SunGard Higher Education Managed Services	23-Jan-2012	4	Lead Provider Start Date: 05-Aug-2011
Simpson Thacher & Bartlett	Legal Advisor	SunGard Higher Education Managed Services	23-Jan-2012	4	Lead Provider Start Date: 05-Aug-2011
Covington & Burling	Legal Advisor	Pharmaceutical Product Development	05-Dec-2011	2	Start Date: 03-Oct-2011
Credit Suisse	Advisor: General	Pharmaceutical Product Development	05-Dec-2011	2	Start Date: 03-Oct-2011
Latham & Watkins	Legal Advisor	Pharmaceutical Product Development	05-Dec-2011	2	Start Date: 03-Oct-2011
Simpson Thacher & Bartlett	Legal Advisor	Pharmaceutical Product Development	05-Dec-2011	2	Start Date: 03-Oct-2011
Simpson Thacher & Bartlett	Legal Advisor	Change Healthcare	02-Nov-2011	7	
Credit Suisse	Advisor: General	Openlink Financial	12-Sep-2011	5	Lead Provider
Simpson Thacher & Bartlett	Legal Advisor	Openlink Financial	12-Sep-2011	5	Lead Provider

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments	
Kirkland & Ellis	Legal Advisor	Verisure	01-Sep-2011	4	Contact: James Learner JD	End Date: 16-Oct-2015
The Goldman Sachs Group	Advisor: General	Mondrian Investment Partners	29-Jul-2011	3	Start Date:	29-Jul-2011
Simpson Thacher & Bartlett	Legal Advisor	Internet Brands	17-Dec-2010	6	Start Date:	17-Dec-2010
					End Date:	31-Aug-2014
Union Square Advisors	Advisor: General	Internet Brands	17-Dec-2010	6	Start Date:	01-Sep-2010
Simpson Thacher & Bartlett	Legal Advisor	Associated Materials	13-Oct-2010	13	Start Date:	08-Sep-2010
UBS Group	Advisor: General	Associated Materials	13-Oct-2010	13	Start Date:	19-Apr-2002
					End Date:	06-Dec-2004
Simpson Thacher & Bartlett	Legal Advisor	Ellucian	10-Dec-2009	6		
Freshfields	Legal Advisor	Hostelworld Group	12-Nov-2009	2	Start Date:	12-Nov-2009
The Goldman Sachs Group	Advisor: General	Hostelworld Group	12-Nov-2009	2	Start Date:	12-Nov-2009
Citigroup	Advisor: General	Neuberger Berman	03-Dec-2008	3	Start Date:	29-Sep-2008
Credit Suisse	Advisor: General	SSP (United Kingdom)	24-Sep-2008	3	End Date:	24-Sep-2008
Deloitte	Advisor: General	SSP (United Kingdom)	24-Sep-2008	3	Contact: Martin Jenkins	End Date: 24-Sep-2008
Baker McKenzie	Legal Advisor	Getty Images Holdings	02-Jul-2008	4		

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments	
Barclays Investment Bank	Advisor: General	Getty Images Holdings	02-Jul-2008	4		
Bird & Bird	Legal Advisor	Getty Images Holdings	02-Jul-2008	4		
NatWest Group	Advisor: General	Getty Images Holdings	02-Jul-2008	4		
Simpson Thacher & Bartlett	Legal Advisor	Getty Images Holdings	02-Jul-2008	4		
Cleary Gottlieb Steen & Hamilton	Legal Advisor	Gaztransport & Technigaz	06-Mar-2008	2	Lead Provider	Start Date: 14-Feb-2008
UBS Group	Advisor: General	Gaztransport & Technigaz	06-Mar-2008	2	Lead Provider	Start Date: 14-Feb-2008
Lehman Brothers	Advisor: General	Daikin Comfort Technologies North America	13-Feb-2008	7	Start Date:	13-Feb-2008
Simpson Thacher & Bartlett	Legal Advisor	Daikin Comfort Technologies North America	13-Feb-2008	7	Start Date:	13-Feb-2008
Simpson Thacher & Bartlett	Legal Advisor	Change Healthcare	11-Feb-2008	4		
Simpson Thacher & Bartlett	Legal Advisor	Catalina Marketing (Saint Petersburg)	01-Oct-2007	4	Start Date:	17-Apr-2007
Credit Suisse	Advisor: General	UKG	13-Jun-2007	5	Start Date:	13-Jun-2007
Simpson Thacher & Bartlett	Legal Advisor	UKG	13-Jun-2007	5	Contact: Felton Booker JD	Start Date: 13-Jun-2007
Sullivan & Cromwell	Legal Advisor	IRIS Software Group	11-Jun-2007	6		
Credit Suisse	Advisor: General	Sheridan Healthcare	21-May-2007	9		

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments	
UBS Group	Advisor: General	Sheridan Healthcare	21-May-2007	9		
Deutsche Bank	Advisor: General	Axel Springer	07-Dec-2006	4	Start Date:	04-Nov-2003
Morgan Stanley	Advisor: General	Intergraph	29-Nov-2006	3	Start Date:	29-Nov-2006
Simpson Thacher & Bartlett	Legal Advisor	Intergraph	29-Nov-2006	3	Start Date:	29-Nov-2006
Allen & Overy	Legal Advisor	Gartmore Group	26-May-2006	1	Start Date:	25-May-2006
Cleary Gottlieb Steen & Hamilton	Legal Advisor	Gartmore Group	26-May-2006	1	Contact: Christopher Austin JD Start Date:	25-May-2006
Fenchurch Advisory	Advisor: General	Gartmore Group	26-May-2006	1		
Ogier	Legal Advisor	Gartmore Group	26-May-2006	1	Start Date:	25-May-2006
The Goldman Sachs Group	Advisor: General	Gartmore Group	26-May-2006	1	Start Date:	25-May-2006
Simpson Thacher & Bartlett	Legal Advisor	Activant Solutions	03-May-2006	8	Contact: Thomas Bell JD Start Date:	03-May-2006
Wachtell, Lipton, Rosen & Katz	Legal Advisor	LPL Financial Holdings	28-Dec-2005	1	End Date:	28-Dec-2005
Barger & Wolen	Legal Advisor	GeoVera Holdings	02-Nov-2005	1	Start Date:	02-Nov-2005
Simpson Thacher & Bartlett	Legal Advisor	Vertafore	22-Dec-2004	3		
Clifford Chance	Legal Advisor	Axel Springer	04-Nov-2003	2	Contact: Alexandra Isaakidis JD Start Date:	04-Nov-2003

Service Provider Name	Service Provided	Deal Name	Deal Date	Deal #	Comments
Ernst & Young Global	Auditor	Axel Springer	04-Nov-2003	2	Contact: Andreas Nendza Start Date: 04-Nov-2003
Skadden, Arps, Slate, Meagher & Flom	Legal Advisor	Nasdaq	03-May-2001	1	Start Date: 08-Nov-2007
Cleary Gottlieb Steen & Hamilton	Legal Advisor	Enlyte Group	22-Feb-2000	2	
Wachtell, Lipton, Rosen & Katz	Legal Advisor	Young & Rubicam	12-Aug-1996	1	Start Date: 12-Aug-1996

Service on a Fund (66)

Service Provider Name	Service Provided	Service To	Comments
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 18 Samson Hockey Fund (2021)
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 20 Samson Shield Fund (2020)
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 13 Hellman & Friedman Capital Partners IX (2019)
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 6 Hellman & Friedman Capital Partners VIII (2016)
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 23 Samson Brunello (2021)
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 10 Hellman & Friedman Capital Partners VI (2007)
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 19 Samson Partners (2020)
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 21 Hellman & Friedman Capital Partners X (2021)
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 11 Hellman & Friedman Capital Partners VII (2011)
Bank of America	Custodian	Investor - Hellman & Friedman	Fund: # 9 H&F Arrow 1 (2020)

Service Provider Name	Service Provided	Service To	Comments	
BNP Paribas	Custodian	Investor - Hellman & Friedman	Fund:	# 21 Hellman & Friedman Capital Partners X (2021)
BNP Paribas Securities Services	Custodian	Investor - Hellman & Friedman	Fund:	# 21 Hellman & Friedman Capital Partners X (2021)
Deutsche Bank	Custodian	Investor - Hellman & Friedman	Fund:	# 21 Hellman & Friedman Capital Partners X (2021)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 21 Hellman & Friedman Capital Partners X (2021)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 10 Hellman & Friedman Capital Partners VI (2007)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 11 Hellman & Friedman Capital Partners VII (2011)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 6 Hellman & Friedman Capital Partners VIII (2016)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 13 Hellman & Friedman Capital Partners IX (2019)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 20 Samson Shield Fund (2020)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 18 Samson Hockey Fund (2021)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 23 Samson Brunello (2021)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 26 Hellman & Friedman Capital Partners XI (2023)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 9 H&F Arrow 1 (2020)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 19 Samson Partners (2020)
Ernst & Young Global	Auditor	Investor - Hellman & Friedman	Fund:	# 27 H&F Clyde Fund (2024)

Service Provider Name	Service Provided	Service To	Comments	
First Republic Bank (National Banks)	Custodian	Investor - Hellman & Friedman	Fund:	# 6 Hellman & Friedman Capital Partners VIII (2016)
First Republic Bank (National Banks)	Custodian	Investor - Hellman & Friedman	Fund:	# 10 Hellman & Friedman Capital Partners VI (2007)
First Republic Bank (National Banks)	Custodian	Investor - Hellman & Friedman	Fund:	# 13 Hellman & Friedman Capital Partners IX (2019)
First Republic Bank (National Banks)	Custodian	Investor - Hellman & Friedman	Fund:	# 11 Hellman & Friedman Capital Partners VII (2011)
Gen II Fund Services	Fund Administrator	Investor - Hellman & Friedman	Fund:	# 21 Hellman & Friedman Capital Partners X (2021)
Gen II Fund Services	Fund Administrator	Investor - Hellman & Friedman	Fund:	# 23 Samson Brunello (2021)
Gen II Fund Services	Fund Administrator	Investor - Hellman & Friedman	Fund:	# 27 H&F Clyde Fund (2024)
Gen II Fund Services	Fund Administrator	Investor - Hellman & Friedman	Fund:	# 18 Samson Hockey Fund (2021)
Gen II Fund Services	Fund Administrator	Investor - Hellman & Friedman	Fund:	# 20 Samson Shield Fund (2020)
Gen II Fund Services	Fund Administrator	Investor - Hellman & Friedman	Fund:	# 19 Samson Partners (2020)
Gen II Fund Services	Fund Administrator	Investor - Hellman & Friedman	Fund:	# 9 H&F Arrow 1 (2020)
Gen II Fund Services	Fund Administrator	Investor - Hellman & Friedman	Fund:	# 13 Hellman & Friedman Capital Partners IX (2019)
IBK Securities	Advisor: General	Investor - Hellman & Friedman	Fund:	# 21 Hellman & Friedman Capital Partners X (2021)
IBK Securities	Advisor: General	Investor - Hellman & Friedman	Fund:	# 13 Hellman & Friedman Capital Partners IX (2019)
ING Luxembourg	Custodian	Investor - Hellman & Friedman	Fund:	# 11 Hellman & Friedman Capital Partners VII (2011)
ING Luxembourg	Custodian	Investor - Hellman & Friedman	Fund:	# 19 Samson Partners (2020)

Service Provider Name	Service Provided	Service To	Comments	
ING Luxembourg	Custodian	Investor - Hellman & Friedman	Fund:	# 20 Samson Shield Fund (2020)
ING Nederland	Custodian	Investor - Hellman & Friedman	Fund:	# 19 Samson Partners (2020)
ING Nederland	Custodian	Investor - Hellman & Friedman	Fund:	# 20 Samson Shield Fund (2020)
ING Nederland	Custodian	Investor - Hellman & Friedman	Fund:	# 11 Hellman & Friedman Capital Partners VII (2011)
JP Morgan Chase	Custodian	Investor - Hellman & Friedman	Fund:	# 13 Hellman & Friedman Capital Partners IX (2019)
JP Morgan Chase	Custodian	Investor - Hellman & Friedman	Fund:	# 6 Hellman & Friedman Capital Partners VIII (2016)
JP Morgan Chase	Custodian	Investor - Hellman & Friedman	Fund:	# 11 Hellman & Friedman Capital Partners VII (2011)
JP Morgan Chase	Custodian	Investor - Hellman & Friedman	Fund:	# 21 Hellman & Friedman Capital Partners X (2021)
Merrill Lynch Pierce Fenner & Smith	Custodian	Investor - Hellman & Friedman	Fund:	# 10 Hellman & Friedman Capital Partners VI (2007)
Merrill Lynch Pierce Fenner & Smith	Custodian	Investor - Hellman & Friedman	Fund:	# 11 Hellman & Friedman Capital Partners VII (2011)
Merrill Lynch Pierce Fenner & Smith	Custodian	Investor - Hellman & Friedman	Fund:	# 21 Hellman & Friedman Capital Partners X (2021)
Merrill Lynch Pierce Fenner & Smith	Custodian	Investor - Hellman & Friedman	Fund:	# 6 Hellman & Friedman Capital Partners VIII (2016)
Merrill Lynch Pierce Fenner & Smith	Custodian	Investor - Hellman & Friedman	Fund:	# 13 Hellman & Friedman Capital Partners IX (2019)
Morgan Stanley Wealth Management	Custodian	Investor - Hellman & Friedman	Fund:	# 13 Hellman & Friedman Capital Partners IX (2019)
Simpson Thacher & Bartlett	Legal Advisor	Investor - Hellman & Friedman	Fund: Start Date:	# 6 Hellman & Friedman Capital Partners VIII (2016) 01-Oct-2009

Service Provider Name	Service Provided	Service To	Comments	
Simpson Thacher & Bartlett	Legal Advisor	Investor - Hellman & Friedman	Fund: Start Date:	# 11 Hellman & Friedman Capital Partners VII (2011) 01-Oct-2009
Simpson Thacher & Bartlett	Legal Advisor	Investor - Hellman & Friedman	Fund: Contact: Start Date:	# 13 Hellman & Friedman Capital Partners IX (2019) Crystal Frierson JD 01-Oct-2009
Simpson Thacher & Bartlett	Legal Advisor	Investor - Hellman & Friedman	Fund: Start Date:	# 21 Hellman & Friedman Capital Partners X (2021) 01-Oct-2009
Societe Generale Luxembourg	Custodian	Investor - Hellman & Friedman	Fund:	# 20 Samson Shield Fund (2020)
Societe Generale Luxembourg	Custodian	Investor - Hellman & Friedman	Fund:	# 13 Hellman & Friedman Capital Partners IX (2019)
Societe Generale Luxembourg	Custodian	Investor - Hellman & Friedman	Fund:	# 11 Hellman & Friedman Capital Partners VII (2011)
Societe Generale Luxembourg	Custodian	Investor - Hellman & Friedman	Fund:	# 19 Samson Partners (2020)
Societe Generale Luxembourg	Custodian	Investor - Hellman & Friedman	Fund:	# 6 Hellman & Friedman Capital Partners VIII (2016)
UBS Group	Placement Agent	Investor - Hellman & Friedman	Fund:	# 26 Hellman & Friedman Capital Partners XI (2023)
Walkers Global	Legal Advisor	Investor - Hellman & Friedman	Fund: Start Date:	# 6 Hellman & Friedman Capital Partners VIII (2016) 09-Nov-2014

Associated Deal Lenders (139)

Lender Name	Lender Type	Last Debt Type	Last Debt Date	# Of Deals
Golub Capital	Lender	Term Loan	07-Feb-2024	5
Apollo Asset Management	Lender	Revolving Credit	22-Nov-2022	11
Ares Management	Lender	Term Loan	22-Nov-2022	6

Lender Name	Lender Type	Last Debt Type	Last Debt Date	# Of Deals
Benefit Street Partners	Lender	Term Loan	22-Nov-2022	5
BlackRock	Lender	Term Loan	22-Nov-2022	2
Blackstone	Lender	Term Loan B	22-Nov-2022	10
Blackstone Credit and Insurance	Lender	Term Loan	22-Nov-2022	10
Blue Owl Capital	Lender	Term Loan	22-Nov-2022	9
Future Standard (USA)	Lender	Bonds	22-Nov-2022	11
HPS Investment Partners	Lender	Term Loan	22-Nov-2022	5
Permira	Lender	Term Loan	22-Nov-2022	2
Tennenbaum Capital Partners	Lender	Revolving Credit	22-Nov-2022	1
Hellman & Friedman	Other Consultant Type	Term Loan	22-Nov-2022	2
Oak Hill Advisors	Lender	Term Loan	11-Apr-2022	1
BMO Financial Group	Commercial Bank	Bonds	26-Nov-2021	13
BNP Paribas	Commercial Bank	Term Loan B	26-Nov-2021	17
Banca Intesa	Commercial Bank	Bonds	26-Nov-2021	1
Banco Santander	Commercial Bank	Term Loan B	26-Nov-2021	5
Bank of America	Commercial Bank	Term Loan B	26-Nov-2021	53
Barclays	Commercial Bank	Term Loan B	26-Nov-2021	50
Citizens Financial Group	Commercial Bank	Revolving Credit	26-Nov-2021	6
Credit Agricole	Commercial Bank	Term Loan B	26-Nov-2021	6
Deutsche Bank	Commercial Bank	Term Loan B	26-Nov-2021	54
Fifth Third Bancorp	Commercial Bank	Term Loan B	26-Nov-2021	4
Intesa Sanpaolo	Commercial Bank	Term Loan B	26-Nov-2021	4
KeyBank	Commercial Bank	Bonds	26-Nov-2021	1
MUFG Bank	Commercial Bank	Bonds	26-Nov-2021	6

Lender Name	Lender Type	Last Debt Type	Last Debt Date	# Of Deals
Mizuho Bank	Commercial Bank	Term Loan B	26-Nov-2021	6
Royal Bank of Canada	Commercial Bank	Bonds	26-Nov-2021	16
Scotiabank	Commercial Bank	Term Loan B	26-Nov-2021	7
Stifel Bank & Trust	Commercial Bank	Term Loan B	26-Nov-2021	4
TD Commercial Banking	Commercial Bank	Term Loan B	26-Nov-2021	4
Truist Financial	Commercial Bank	Term Loan B	26-Nov-2021	7
U.S. Bancorp	Commercial Bank	Term Loan B	26-Nov-2021	8
Wells Fargo	Commercial Bank	Term Loan B	26-Nov-2021	16
J.P. Morgan Securities	Financing Advisory	Bonds	26-Nov-2021	1
Macquarie Group	Financing Advisory	Term Loan B	26-Nov-2021	7
Mitsubishi UFJ Securities Holdings	Financing Advisory	Term Loan B	26-Nov-2021	4
Mizuho Financial Group	Financing Advisory	Bonds	26-Nov-2021	6
BMO Capital Markets	Investment Bank	Term Loan B	26-Nov-2021	7
Barclays Investment Bank	Investment Bank	Bonds	26-Nov-2021	5
BofA Securities	Investment Bank	Term Loan B	26-Nov-2021	9
Credit Suisse	Investment Bank	Bonds	26-Nov-2021	39
Deutsche Bank Securities	Investment Bank	Term Loan B	26-Nov-2021	8
HSBC Securities (USA)	Investment Bank	Term Loan B	26-Nov-2021	6
IMI Corporate & Investment Banking	Investment Bank	Term Loan B	26-Nov-2021	1
JP Morgan Chase	Investment Bank	Bonds	26-Nov-2021	40
KKR Capital Markets	Investment Bank	Term Loan B	26-Nov-2021	4
KeyBanc Capital Markets	Investment Bank	Term Loan B	26-Nov-2021	4
Macquarie Capital	Investment Bank	Bonds	26-Nov-2021	10
Morgan Stanley	Investment Bank	Revolving Credit	26-Nov-2021	49

Lender Name	Lender Type	Last Debt Type	Last Debt Date	# Of Deals
Nomura Holdings	Investment Bank	Bonds	26-Nov-2021	34
RBC Capital Markets	Investment Bank	Term Loan B	26-Nov-2021	8
SMBC Nikko Securities America	Investment Bank	Bonds	26-Nov-2021	1
Santander Corporate & Investment Banking	Investment Bank	Bonds	26-Nov-2021	1
Scotiabank Global Banking and Markets	Investment Bank	Bonds	26-Nov-2021	1
TD Securities	Investment Bank	Term Loan B	26-Nov-2021	6
The Goldman Sachs Group	Investment Bank	Revolving Credit	26-Nov-2021	42
Wells Fargo Securities	Investment Bank	Term Loan B	26-Nov-2021	6
Antares Capital	Lender	Term Loan B	26-Nov-2021	1
Audax Private Debt	Lender	Term Loan B	26-Nov-2021	1
BNP Paribas Securities Services	Lender	Term Loan B	26-Nov-2021	4
Credit Agricole Entreprises	Lender	Bonds	26-Nov-2021	1
Jefferies Finance	Lender	Bonds	26-Nov-2021	17
Kohlberg Kravis Roberts	Lender	Bonds	26-Nov-2021	6
Morgan Stanley Private Credit	Lender	Term Loan B	26-Nov-2021	4
New Mountain Capital	Lender	Term Loan B	26-Nov-2021	6
ORIX Growth Capital	Lender	Term Loan B	26-Nov-2021	1
Sumitomo Mitsui Banking	Lender	Term Loan B	26-Nov-2021	7
UBS Group	Investment Bank	Bonds	02-Aug-2021	34
Steele Creek Investment Management	Lender	Term Loan B	02-Aug-2021	1
The PNC Financial Services Group	Commercial Bank	Term Loan B	23-Jul-2021	4
Bank of the West	Commercial Bank	Term Loan B	05-Jun-2021	3
HSBC Holdings	Commercial Bank	Bonds	05-Jun-2021	16

Lender Name	Lender Type	Last Debt Type	Last Debt Date	# Of Deals
MUFG Union Bank	Commercial Bank	Term Loan A	05-Jun-2021	5
Santander Bank	Commercial Bank	Term Loan B	05-Jun-2021	2
Jefferies Financial Group	Investment Bank	Term Loan B	05-Jun-2021	2
Societe Generale	Investment Bank	Term Loan B	05-Jun-2021	3
Citigroup	Lender	Bonds	05-Jun-2021	22
ING Barings Private Equity	Lender	Term Loan B	05-Jun-2021	3
ING Capital Markets	Lender	Term Loan B	05-Jun-2021	2
Morgan Stanley Senior Funding	Lender	Term Loan B	05-Jun-2021	2
The Carlyle Group	Lender	Term Loan B	05-Jun-2021	4
UniCredit	Commercial Bank	Bonds	15-Jan-2021	7
Sixth Street Partners	Lender	Term Loan	09-Sep-2020	1
Owl Rock Capital Group	Lender	Revolving Credit	16-Mar-2020	2
J.P. Morgan (New York)	Investment Bank	Term Loan	14-Feb-2020	5
CIC Private Debt	Mezzanine	Term Loan	14-Feb-2020	1
ABN AMRO Bank	Commercial Bank	Revolving Credit	14-May-2019	2
Blue Hills Bank	Commercial Bank	Revolving Credit	03-Aug-2018	1
Capital One Financial	Commercial Bank	Revolving Credit	03-Aug-2018	1
Eastern Bankshares	Commercial Bank	Revolving Credit	03-Aug-2018	1
First Midwest Bank	Commercial Bank	Revolving Credit	03-Aug-2018	1
TD Bank	Commercial Bank	Revolving Credit	03-Aug-2018	1
VersaBank	Commercial Bank	Revolving Credit	03-Aug-2018	1
Danske Bank	Commercial Bank	Term Loan B	13-Feb-2018	3
Nordea Bank	Commercial Bank	Term Loan	13-Feb-2018	9
Skandinaviska Enskilda Banken	Commercial Bank	Term Loan B	13-Feb-2018	6

Lender Name	Lender Type	Last Debt Type	Last Debt Date	# Of Deals
SunTrust Bank	Commercial Bank	Term Loan B	04-Aug-2017	3
Prospect Capital Management	Lender	Term Loan	04-Aug-2017	1
ANZ Group Holdings	Commercial Bank	Other	01-Jul-2017	1
HSBC Bank UK	Commercial Bank	Other	01-Jul-2017	1
National Australia Bank	Commercial Bank	Other	01-Jul-2017	1
Barings	Lender	Term Loan B	01-Jun-2016	1
Crescent Capital Group	Lender	Term Loan B	12-Oct-2015	2
SLR Capital Partners	Lender	Term Loan B	12-Oct-2015	1
Clearlake Credit	Lender	Term Loan B	06-Oct-2015	1
EQT	Lender	Term Loan B	06-Oct-2015	1
Invesco	Lender	Term Loan B	06-Oct-2015	3
Brookfield Oaktree Holdings	Lender	Term Loan	07-Oct-2014	2
GE Capital	Lender	Term Loan A	28-Aug-2014	10
Main Street Capital	Lender	Term Loan B	11-Apr-2014	2
Barclays UK	Commercial Bank	Term Loan B	01-Feb-2014	1
Credit Suisse Securities (USA)	Investment Bank	Term Loan B	24-Jan-2014	1
American Capital	Lender	Term Loan	24-Jan-2014	2
HCAP Partners	Lender	Term Loan	24-Jan-2014	1
PennantPark	Lender	Term Loan B	14-Sep-2012	2
Bank of Ireland Group	Commercial Bank	Revolving Credit	03-Jul-2012	3
Lloyds Bank	Commercial Bank	Revolving Credit	03-Jul-2012	3
Carlyle AlpInvest	Lender	Term Loan	12-Sep-2011	2
Partners Group	Lender	Term Loan	01-Sep-2011	1
Partners Group Private Equity	Other Service Provider Type	Term Loan	01-Sep-2011	1

Lender Name	Lender Type	Last Debt Type	Last Debt Date	# Of Deals
Lloyds Banking Group	Commercial Bank	Term Loan	24-Sep-2008	1
NatWest Group	Commercial Bank	Term Loan	24-Sep-2008	3
BC Partners	Lender	Term Loan	02-Jul-2008	1
GE Commercial Finance	Lender	Term Loan B	02-Jul-2008	1
Calyon Financial	Financing Advisory	Revolving Credit	13-Feb-2008	2
Farallon Capital Management	Lender	Bonds	13-Feb-2008	1
Grand Sud Ouest Capital	Lender	Term Loan B	13-Feb-2008	1
Bear Stearns	Investment Bank	Revolving Credit	01-Oct-2007	5
Wachovia Bank	Commercial Bank	Term Loan	13-Jun-2007	6
Credit Suisse First Boston	Investment Bank	Term Loan B	13-Jun-2007	12
Bridge Bank	Commercial Bank	Term Loan	11-Jun-2007	1
Lehman Brothers	Investment Bank	Term Loan B	21-May-2007	9
The Gladstone Companies	Lender	Term Loan B	03-May-2006	1
Bayern LB	Commercial Bank	Term Loan	01-Mar-2001	1
First Union National Bank	Investment Bank	Revolving Credit	19-Oct-1999	2
Citigroup Alternative Investments	Mezzanine	Term Loan	12-Aug-1996	1
Drexel Burnham Lambert	Investment Bank	Term Loan	01-Jan-1984	1

Investment Preferences

Preferred Industries	Geographical Preference	Preferred Deal Types	Preferred Verticals	Other Investment Preferences
Capital Markets/Institutions, Energy, Healthcare, Information Services (B2C), Insurance, Internet Service Providers, Media and Information Services (B2B), Retail, Services (Non-Financial), Software	United States	Buyout/LBO, PE Growth/Expansion	CleanTech, Digital Health, E-Commerce, FinTech, HealthTech, Industrials, InsurTech, SaaS, TMT	Long-Term Investor, Prefers majority stake, Prefers minority stake, Seeks ESG investments, Seeks Impact investments

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